This Query Manager manual has been updated as of 4-26-10.

Changes include:

- Steps for adding a prompt (p. 20-21)
- Logical operator clarification (p. 25)
- Steps for adding criteria based on condition type (p. 27)
- Definition of each condition type (p. 28)
- Adding criteria from prompt page (p. 29)
- Adding criteria from criteria page (p. 29)

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Office of Human Resources
University of Minnesota

Query Manager

Reference Manual 4-26-10

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QUERY MANAGER

Reference Manual

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Overview

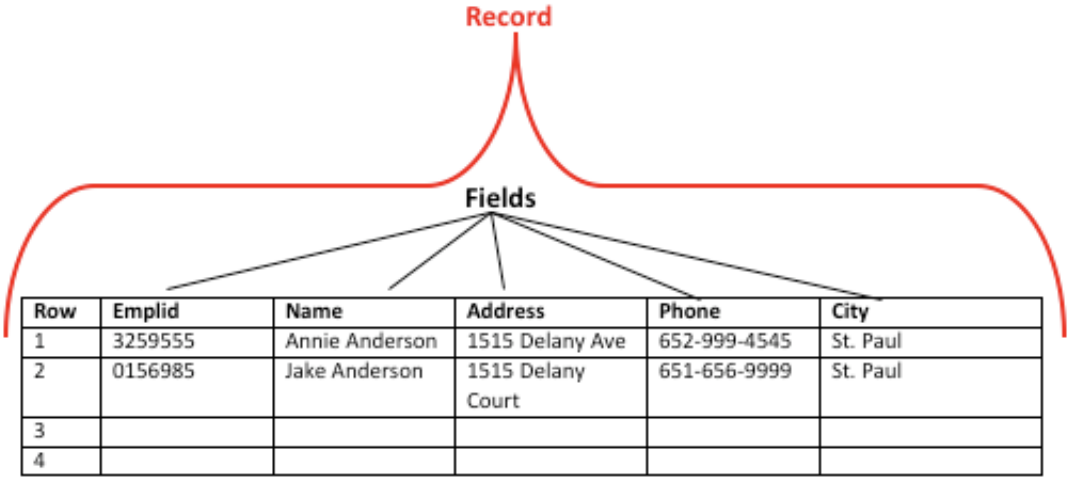
When a transaction is entered in the system, the data is stored in tables (records). Each individual piece of data can be identified by the column (field) and row (transaction) it is in. When a query is created, the data to be included is selected by specifying which columns and rows the system should retrieve.

Within PeopleSoft there are many ways to access this data: inquiries, generic reports, nVision reports, and queries all access data within the system.

The other methods of retrieving data are fairly predefined. There may be certain selection criteria to allow the user to limit what information is retrieved, but for the most part there is little that can be done to change what information is retrieved. The Query module, however, allows end users to define their own request for information.

The Query Manager allows users to view existing queries just as Query Viewer does, but it also allows users to modify existing queries and create new or private ones. Individuals may want to modify existing queries to limit the results or summarize the detail.

Queries that are public cannot be modified. However, users may use public queries as a basis for a custom query. New queries can be created using existing queries or by selecting records (tables) that contain the desired information. The flexibility of this area is limited only by a user's security access, which determines if that user has the rights to view the data being requested by the query.



Row	Emplid	Name	Address	Phone	City
1	3259555	Annie Anderson	1515 Delany Ave	652-999-4545	St. Paul
2	0156985	Jake Anderson	1515 Delany Court	651-656-9999	St. Paul
3					
4					

Column Header = Field name

Column Data = Data entered in fields

Rows = Transaction or related data

Validation

Validation is the process that ensures entered data falls within acceptable boundaries. Various methods may be employed to determine the accuracy of financial information. Units should designate at least one individual to be responsible for validation.

There is not one set way to validate queries. In fact, depending on the type of query, the validation method may differ significantly. Keep these key things in mind before validating:

- There needs to be a complete understanding of the requirements of the query, its purpose, and how it will be used.
- Knowledge of the data worked with is essential. It is most beneficial if there is some exposure to the front end system and how transactions flow through the process prior to creating query. However, researching data as queries are developed can provide as much or more knowledge.
- Validation does not have to occur each time the query is run, only when it is developed or if there are major changes. Also, it is a requirement that the query validator is comfortable with the data and that the data is correct. If the criteria is changed and the query validator is certain of the data before the query is run and is certain the criteria is correct, then it is up to the query validator whether these steps are performed.

Public queries have gone through extensive testing, but the key is to know if it is returning the same data that is expected. Review the query setup, in particular the records and the criteria. Ensure that what is being excluded from the results is known.

Limit results to a small subset (one DeptID, one user, etc.). Review the results and verify them within the module. If the query is returning results that match the system, it is likely correct.

Module review can be along the lines of inquiries to double check the transactions, or run a report that would show the total for a comparable timeframe as the query.

Performing a couple of these small subset reviews (two to three DeptIDs or users) to validate one sample may not be enough.

In situations where calculations are being performed by the query, a detail query could be developed and validated outside Query Manager. Those results could be used to validate the summary query.

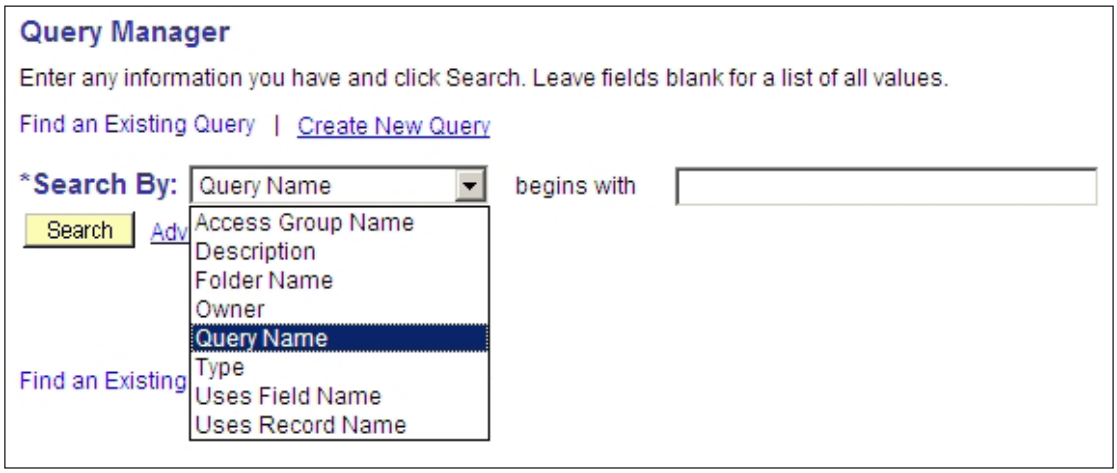
Locating Queries: Basic Search

There are thousands of existing queries within the system. Some are default PeopleSoft queries, whereas others are defined specifically for the University of Minnesota. It is a best practice to determine if a query that provides the information needed already exists. If so, there is no need to create a private query. Even if there is not a query that is a perfect match, queries within the Report Manager can be used as templates or as a basis for specific needs. It is more efficient to modify an existing query than to create one from scratch each time.

A basic search allows the search to be performed using the "begins with" condition on the following fields:

- *Query Name*
- *Description*
- *Type*
- *Uses Field Name*
- *Uses Record Name*
- *Access Group Name*
- *Folder Name*
- *Owner*

Navigate to: **Reporting Tools > Query > Query Manager**.



Field Name	Field Description
Access Group Name	This is a grouping of records that are used within a particular module.
Description	Description of the query.
Folder Name	Folders can be set up by each user to organize private queries.

Locating Queries: Basic Search (cont.)

Owner Public or private. Public queries are available to the University as a whole and cannot be modified. Private queries are defined by individuals.

Query Name Name of the query.

University custom queries generally follow a specified naming convention. All queries start with UM_ and then the business area abbreviation. For example, UM_FAR would locate customized queries for the Receivables module.

Note that the naming convention has not been followed exclusively.

Abbreviation	Module	Abbreviation	Module
CEO	Enterprise Components	FCA	Contracts
DBI	Billing	FEX	Expenses
DPO	Purchasing	FFG	Financial Gateway
DPV	eProcurement	FGL	General Ledger
FAM	Asset Management	FGM	Grants Management
FAP	Payables	FPC	Projects
FAR	Receivables	FPG	Program Management
FBD	Budgets	FTR	Treasury

Type "User." The other options ("Archive,""Process,""Role") are not being used.

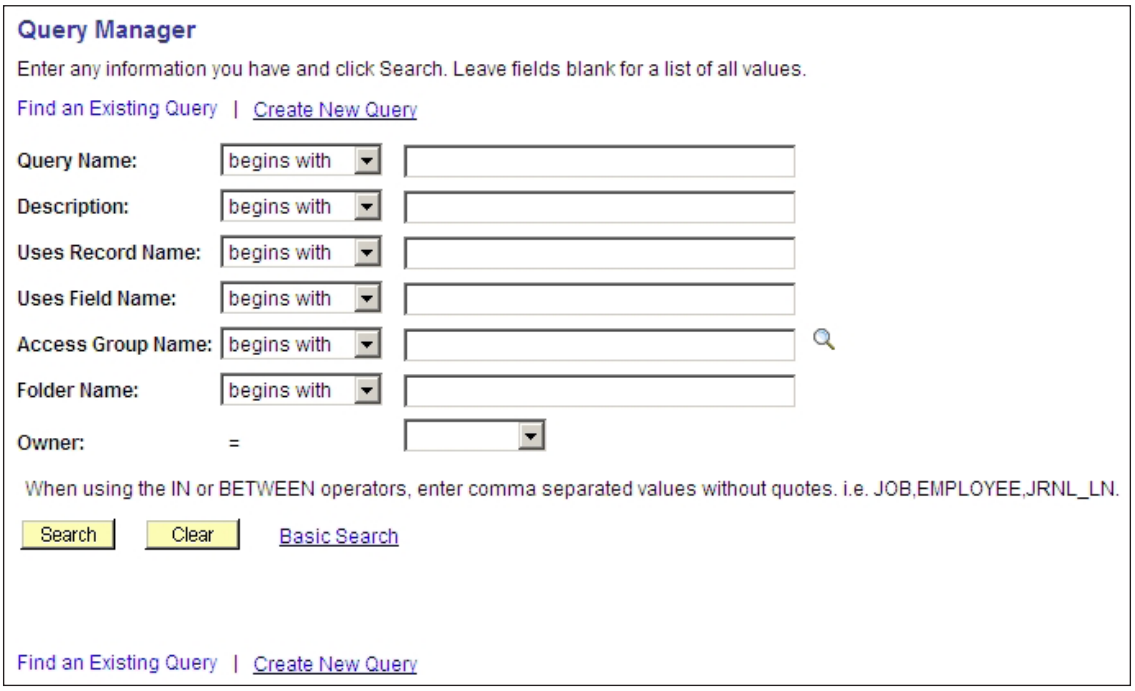
Uses Field Name Retrieves all queries that use the *Field* identified.

Uses Record Name Retrieves all queries using a particular record (table).

By default, only the first 20 records appear on the page. To see more of the list, use the navigation buttons and links located on the header bar. To display 100 of the records, click <View 100> and use the scrollbar to go through the rest of the list, or use the advanced search option to limit the results further. The maximum number results returned is 300.

Locating Queries: Advanced Search

An advanced search allows users to search using a variety of conditions and multiple criteria at the same time. It allows a progressively narrower search to be performed using one or more search-by criteria and then selecting from a broad choice of conditions.

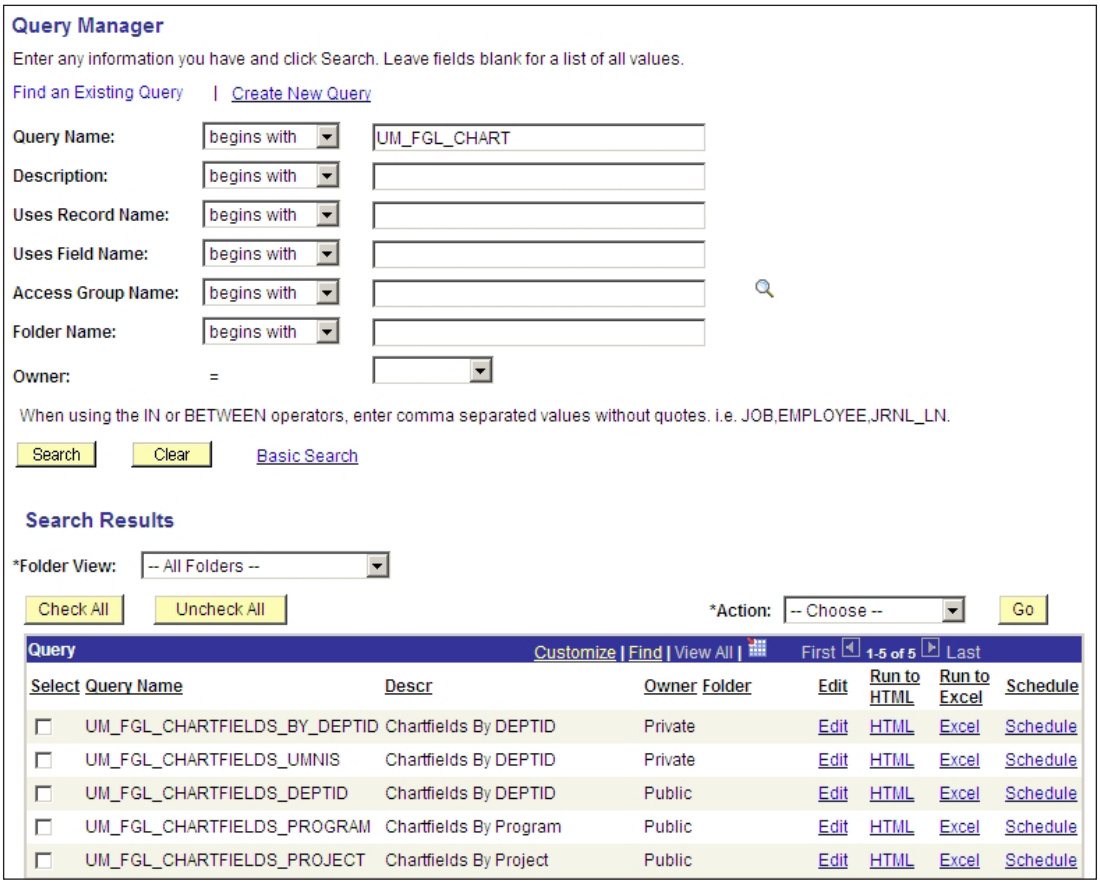

Query Manager
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Query | Create New Query
Query Name: begins with
Description: begins with
Uses Record Name: begins with
Uses Field Name: begins with
Access Group Name: begins with
Folder Name: begins with
Owner: =
When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.
Search
Clear
Basic Search
Find an Existing Query | Create New Query

For each search option, the condition can be set according to the following options:

- Begins with
- Less than
- Less than or equal to
- Equal to
- Greater than
- Greater than or equal to
- Contains
- Not equal to
- In
- Between

Search Results

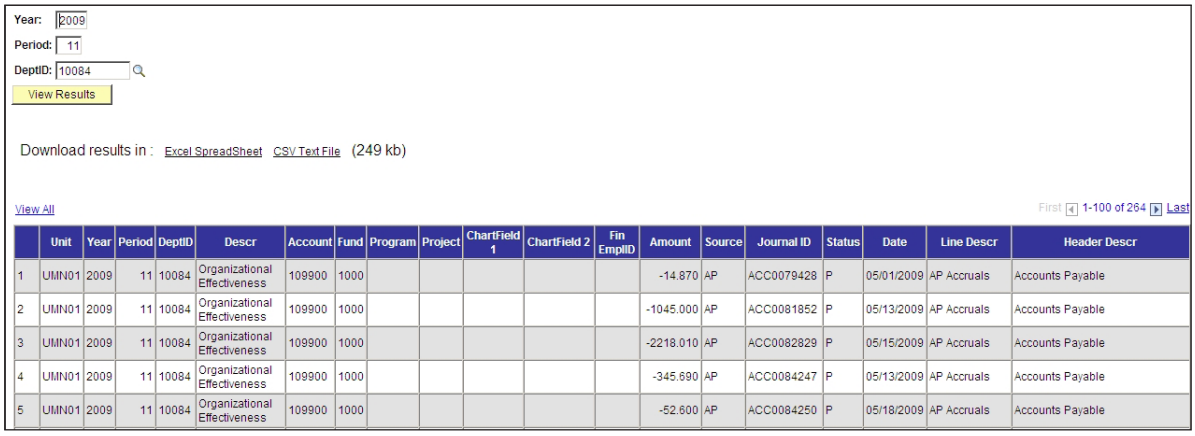
Once a search is performed, the resulting queries will appear below the *Query Parameters*. In situations where there are many resulting queries, refining the search using additional fields is helpful.


Query Manager
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Query | Create New Query
Query Name: begins with UM_FGL_CHART
Description: begins with
Uses Record Name: begins with
Uses Field Name: begins with
Access Group Name: begins with
Folder Name: begins with
Owner: =
When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.
Search Clear Basic Search
Search Results
*Folder View: -- All Folders --
Check All Uncheck All *Action: -- Choose -- Go
Query Customize | Find | View All | First 1-5 of 5 Last
Select Query Name Descr Owner Folder Edit Run to HTML Run to Excel Schedule
UM_FGL_CHARTFIELDS_BY_DEPTID Chartfields By DEPTID Private Edit HTML Excel Schedule
UM_FGL_CHARTFIELDS_UMNIS Chartfields By DEPTID Private Edit HTML Excel Schedule
UM_FGL_CHARTFIELDS_DEPTID Chartfields By DEPTID Public Edit HTML Excel Schedule
UM_FGL_CHARTFIELDS_PROGRAM Chartfields By Program Public Edit HTML Excel Schedule
UM_FGL_CHARTFIELDS_PROJECT Chartfields By Project Public Edit HTML Excel Schedule

Field Name	Field Description
Select	Checkbox that is used in conjunction with **Action** drop-down menu.
Query Name	Name identified.
Description	Short description of query purpose.
Owner	Public or private.
Folder	Folders can be used to organize queries. If organized, the folder name appears here.
Edit	Select to view query definition and edit.
Run to HTML	Runs query in web format. Can be used to preview results.
Run to Excel	Runs query in Excel format.
Schedule	Use this feature to schedule private queries to run automatically and distribute results via inbox or email.

RUN TO HTML

When <Run to HTML> is clicked, the output opens in a web window or tab. Results can be downloaded from HTML to Excel or CSV (comma separated value) files.



Year: 2009
Period: 11
DeptID: 10084
View Results

Download results in : Excel SpreadSheet CSV Text File (249 kb)

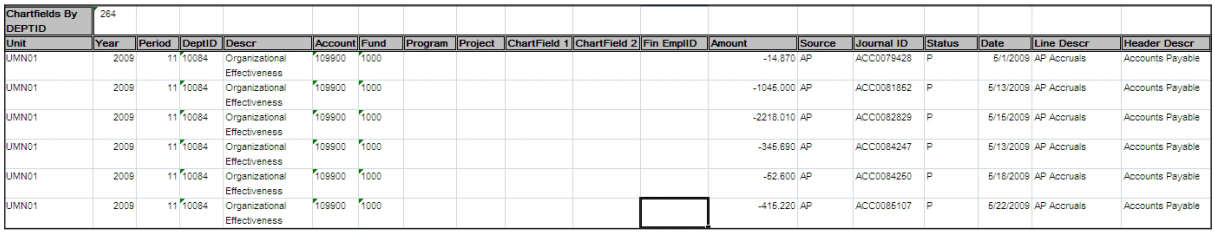
View All First 1-100 of 264 Last

	Unit	Year	Period	DeptID	Descr	Account	Fund	Program	Project	ChartField 1	ChartField 2	Fin EmplID	Amount	Source	Journal ID	Status	Date	Line Descr	Header Descr
1	UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-14.870	AP	ACC0079428	P	05/01/2009	AP Accruals	Accounts Payable
2	UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-1045.000	AP	ACC0081852	P	05/13/2009	AP Accruals	Accounts Payable
3	UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-2218.010	AP	ACC0082829	P	05/15/2009	AP Accruals	Accounts Payable
4	UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-345.690	AP	ACC0084247	P	05/13/2009	AP Accruals	Accounts Payable
5	UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-52.600	AP	ACC0084250	P	05/18/2009	AP Accruals	Accounts Payable

- Click either <Excel Spreadsheet> or <CSV Text File> on the results page.
- CSV is used most often when data is to be imported into another application. It is the best option in situations where the number of rows returned exceeds the allowable number of rows for Excel. The limit is 65,536 rows for Excel 2003 and earlier versions, or 1,048,575 for Excel 2007 and later versions; however, there are issues when saving files that exceed 65,536 rows from PeopleSoft into Excel 2007.

RUN TO EXCEL

Click <Run to Excel> to download the query directly to an Excel spreadsheet or CSV text file. The first row in the spreadsheet will display the total number of rows included in the spreadsheet.



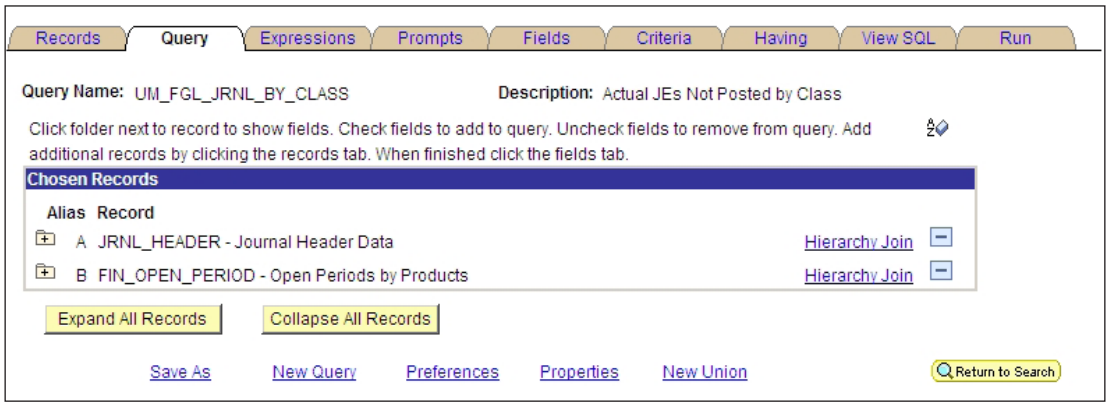
Chartfields By DEPTID	264																		
Unit	Year	Period	DeptID	Descr	Account	Fund	Program	Project	ChartField 1	ChartField 2	Fin EmplID	Amount	Source	Journal ID	Status	Date	Line Descr	Header Descr
UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-14.870	AP	ACC0079428	P	5/1/2009	AP Accruals	Accounts Payable
UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-1045.000	AP	ACC0081852	P	5/13/2009	AP Accruals	Accounts Payable
UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-2218.010	AP	ACC0082829	P	5/15/2009	AP Accruals	Accounts Payable
UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-345.690	AP	ACC0084247	P	5/13/2009	AP Accruals	Accounts Payable
UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-52.600	AP	ACC0084250	P	5/18/2009	AP Accruals	Accounts Payable
UMN01	2009	11	10084	Organizational Effectiveness	109900	1000						-415.220	AP	ACC0086107	P	5/22/2009	AP Accruals	Accounts Payable

Note: If the spreadsheet cannot include all of the rows from the entered query, the first row will display—in a red font—the total number of rows from the entered query that are included in the spreadsheet. The maximum row limit for Excel is 1,048,474.

Editing an Existing Query

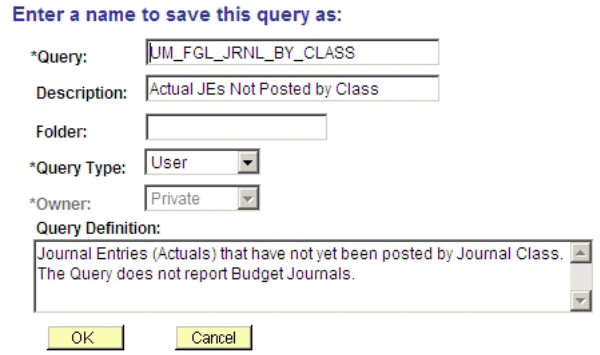
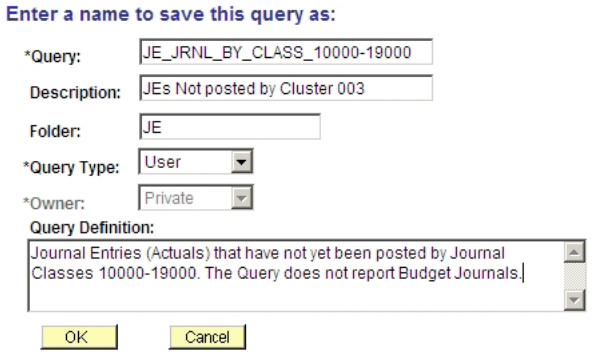
Navigate to: **Reporting Tools > Query > Query Manager**.

1. On the Query Manager search results page, search for and locate the query to be modified or viewed, and click <Edit>.
2. This brings up the query definition. Public queries cannot be modified. To use an existing query as a template, save it as a private query.



Tab Name	Tab Description
Records	Allows additional records (tables) to be added to the query.
Query	Shows all records and their fields for the selected records. This is where the fields that display along with their criteria can be selected.
Expressions	Shows SQL statements and calculations performed as part of a query. Allows user to create new fields to be included in the query output.
Prompts	Allow users to change the limiting criteria each time the query is run.
Fields	Shows the fields that will display, along with the column order, the sort order, and any criteria that have been defined.
Criteria	Allows results to be limited to only those rows that meet identified values.
Having	Used when a criteria needs to be copied to a field that is also aggregated.
View SQL	View the query in sentence-like structure. This is the SQL query that has been written using the tabs in Query Manager.
Run	View output of the query.

Information will default from the original query.

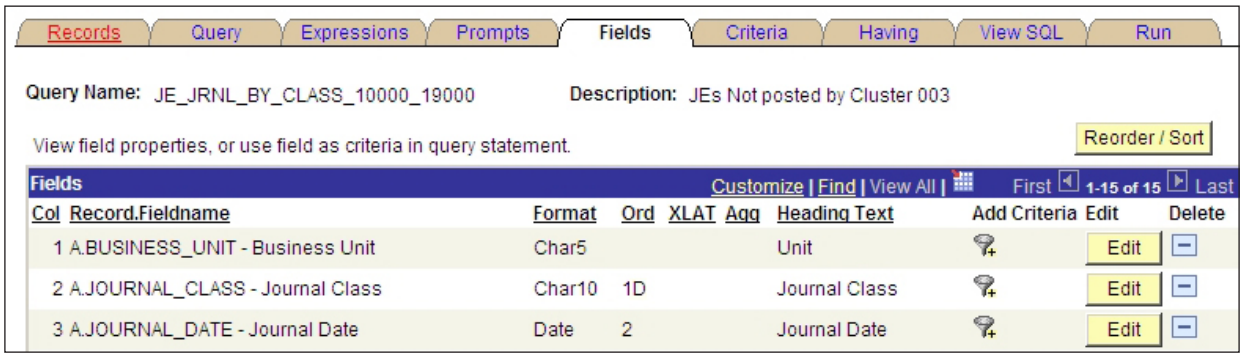
Original information will default in	Update information
	

Field Name	Field Description
Query Name	The name of the query. Name the query in such a way as it will make sense to everyone who needs to access it. Best practice would be to develop a naming convention.
Description	Change the default description based on the query being developed. Keep in mind that this field is searchable, so the method of entering a description would be best served by a standard description.
Folder	Folders can be used to organize private queries. Develop a folder structure that will enable organization of queries for easy access. Queries with folders associated that are copied to other users will maintain the folder structure. Best practice would be for units to develop common folder structures used by all when sharing queries. This field is also available to limit query results when performing searches.
Query Type	Leave as default.
Owner	"Private" will be the only option. Users can only create private queries. Queries that have an owner identified as "Public" are centrally defined queries that can be run but not edited. This field is also available to limit query results when performing searches.
Query Definition	Area where a detailed description can be entered. Can be used to identify the purpose of query, criteria, special calculations, summarization, prompts, etc. This field is useful to understand what rows of data the query will return, especially when sharing queries with other users.

Fields Page

The **Fields** page identifies the fields that will appear in the results when the query is run. From this screen, a number of other options can be defined or modified:

- Selection criteria
- Sort order
- The order the fields appear in the results
- The column header
- Criteria/prompts/expressions on the fields


Records
Query
Expressions
Prompts
Fields
Criteria
Having
View SQL
Run
Query Name: JE_JRNL_BY_CLASS_10000_19000
Description: JEs Not posted by Cluster 003
View field properties, or use field as criteria in query statement.
Reorder / Sort
Fields
Customize | Find | View All | First 1-15 of 15 Last
Col Record.Fieldname Format Ord XLAT Agg Heading Text Add Criteria Edit Delete
1 A.BUSINESS_UNIT - Business Unit Char5 Unit Edit
2 A.JOURNAL_CLASS - Journal Class Char10 1D Journal Class Edit
3 A.JOURNAL_DATE - Journal Date Date 2 Journal Date Edit

Field Name	Field Description
Col	Identifies the order the fields will appear in the results from left to right.
Record.Fieldname	Identifies the record and field selected. The record alias is the alpha character to the left of the period, and the field name is in all caps to the right of the period. The field description follows after the dash. The record being used is assigned an alphabetic alias on the **Query** tab to find the actual record name associated with the alias.
Format	Format of the resulting data. (This is for informational purposes only and cannot be modified.)
Ord	Shows one or more fields selected to sort query output. If the field is the first sort field, a "1" appears and the system sorts rows based on this field first. The second sort field that is selected is numbered "2," and so on. A descending sort order can also be specified. The letter "D" appears if fields are being sorted in descending order. If descending is not selected, the default will be ascending (smallest to largest).

XLAT

The table being queried may include fields that use a *Translate* table. If so, the field contains a short code telling the user which *Translate* table is providing a set of corresponding values. N (none), S (short), or L (long). Click <Edit> to change.

For example, if the table includes an *EFF_STATUS* field, the value is "A" or "I," which the *Translate* table translates into "Active" or "Inactive," respectively. If a field has values on the *Translate* table, a letter appears in the *XLAT* column for that field.

Specifies the translate value to appear in the query results: N (none), S (short), or L (long). Click <Edit> to change.

Agg

An aggregate function is one that performs a computation on a set of values rather than on a single value. For example, for a numerical value the aggregate options are:

- Count
- Sum
- Min
- Max
- Average

Calculations will be performed on each unique row of data in query output (see *Aggregate* section).

Heading Text

The text that appears on the column header in the results.

Add Criteria

Criteria are used to limit the results of a query based on the values in a field. For example, to limit the results to a particular DeptID, criteria can be entered to return results only when the *DeptID* field = 10000.

Criteria can be associated or changed by clicking <Add Criteria> on the **Fields** page. See the section of this manual titled "Criteria Page" for detailed instructions. It can also be added by clicking <Add Criteria> on the **Query** page.

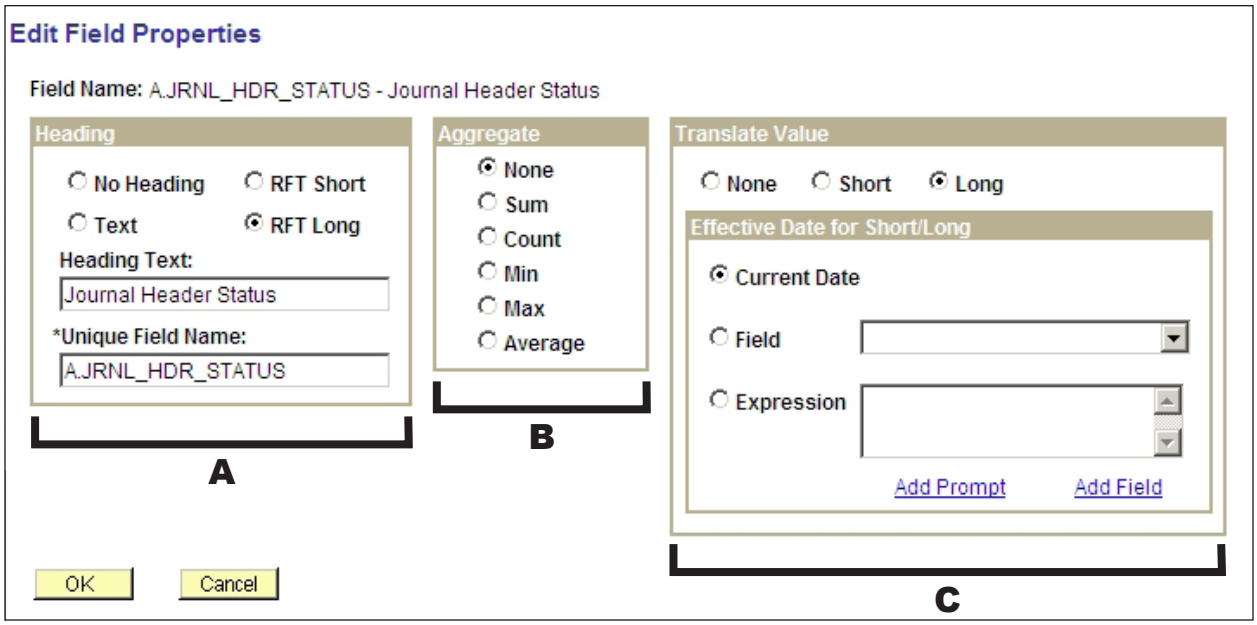
Edit

Use the edit function to modify the column header or set up an aggregate function. An aggregate function is one that performs a computation on a set of values rather than on a single value. For example, finding the average or mean of a list of numbers.

Delete

Use to delete a field.

Fields Page: Edit Function



A. HEADING SECTION

Determines what will appear in the column header on the query.

Field Name	Field Description
No Heading	No heading will display.
Text	Select this radio button if a user-defined header will be entered in *Heading Text*.
RFT Short	Record field table short name.
RFT Long	Record field table long name.
Heading Text	User-defined text can be entered, which will appear as the header in the column.
***Unique Field Name**	Actual field name within the record.

B. AGGREGATE SECTION

Aggregate calculations will be performed on each row of data in the output results (see example).

Field Name	Field Description
None	No action. (This is the default setting.)
Sum	Adds the values from each row and displays the total.
Count	Counts the number of rows.

Min	(Minimum) Checks the value from each row and returns only those over the threshold identified.
Max	(Maximum) Checks the value from each row and returns only those under the threshold identified.
Average	Adds the values from each row and divides the result by the number of rows.

C. TRANSLATE VALUE

Fields that have a translation table associated with them will have the option of choosing to use the Short Value, Long Value, or no translation. Fields without a translate table will not have this option under Edit.

Field Name	Field Description
None	No translation value is used.
Short	The short translation value is used. For example, for the Journal header status, 'E' would appear for fields with a value of 'Journal has errors.'
Long	The long translation value is used. For example, for the Journal header status, 'Journal Has Errors' would appear in the field.
Current Date	Will use the translation values effective on the current date.
Field	Choose to use the translation values based on other dates (e.g., transaction date, created date etc.).
Expression	Expressions to choose the effective date can also be created.

Fields Page: Aggregate

Aggregate calculations will be performed on each unique row of data in the output results. For example, to attain a total record count of journal entries entered by *UserID*:

Table A depicts the fields selected to appear in the query output results and the data returned without an aggregate identified.

Journal ID	UserID	Date
0000065656	ANDE055	08/15/2009
0000065454	ANDE055	08/15/2009
0000035356	ANDE055	08/20/2009
0000045454	ANDE055	08/20/2009
0000062364	JAND021	09/15/2009
0000064554	JAND021	09/16/2009

Table B depicts three fields being included in the query output: *Journal ID, UserID,* and *Date*. The count of journal entries based on unique combinations of *UserID* and *Date*.

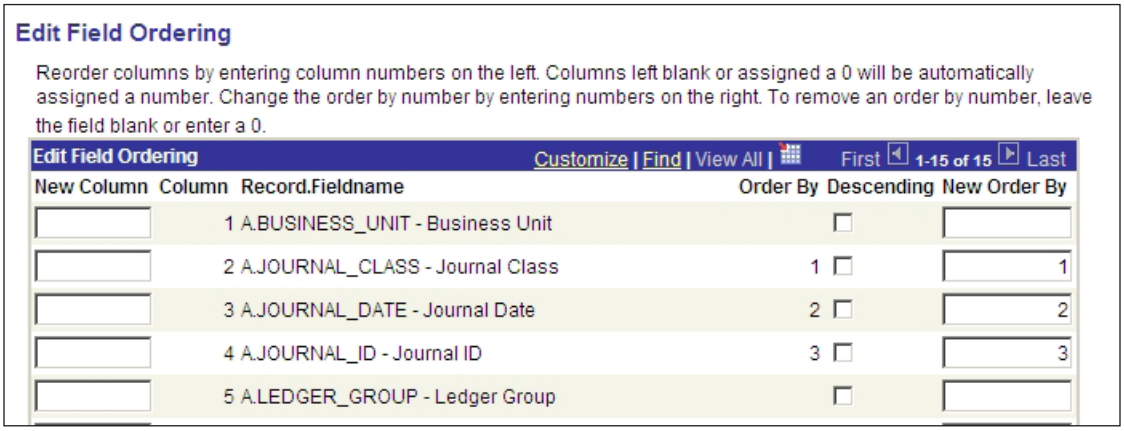
Count Journal ID	UserID	Date
2	ANDE055	08/15/2009
2	ANDE055	08/20/2009
1	JAND021	09/15/2009
1	JAND021	09/16/2009

Table C depicts two fields being included in the query output: the count based on just unique *UserID*s.

Count Journal ID	UserID
4	ANDE055
2	JAND021

Fields Page: Reorder/Sort Fields

To change the order in which the fields will appear and the sort options, click <Reorder/Sort>.


Edit Field Ordering
Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.
Edit Field Ordering
Customize | Find | View All |
First 1-15 of 15 Last
New Column
Column
Record.Fieldname
Order By
Descending
New Order By
1 A.BUSINESS_UNIT - Business Unit
2 A.JOURNAL_CLASS - Journal Class
1
1
3 A.JOURNAL_DATE - Journal Date
2
2
4 A.JOURNAL_ID - Journal ID
3
3
5 A.LEDGER_GROUP - Ledger Group

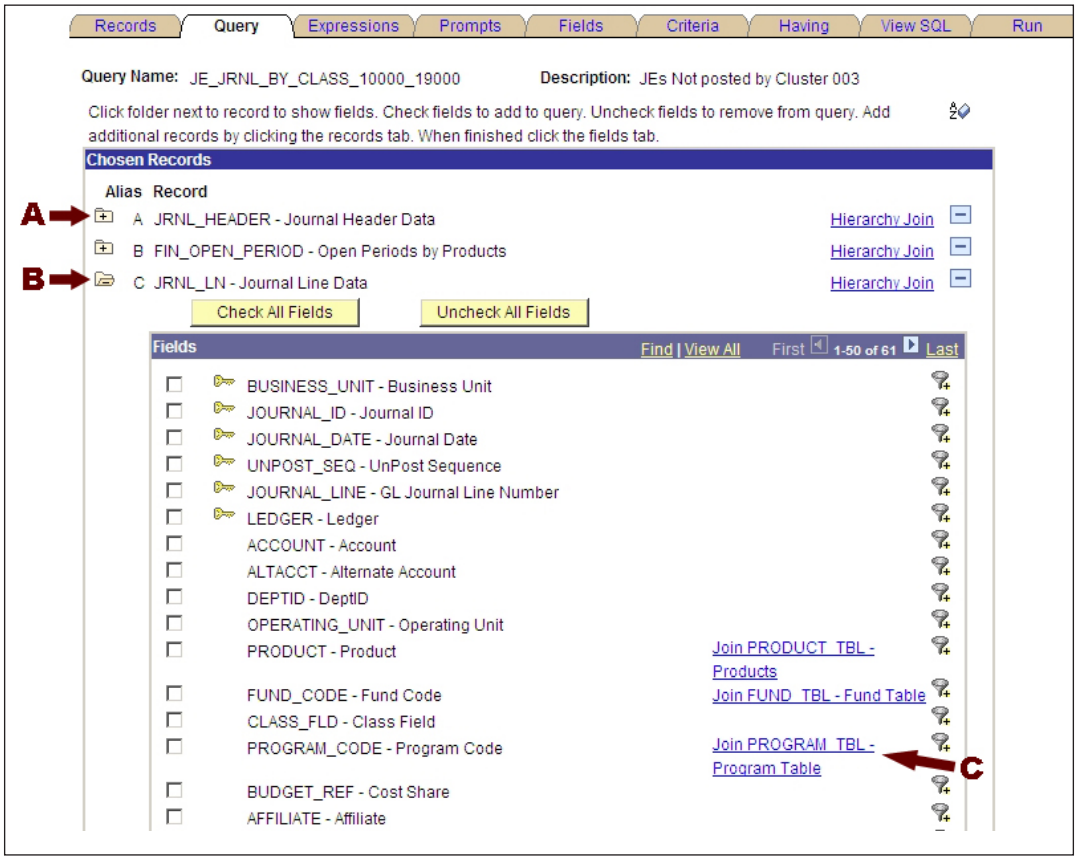
Field Name	Field Description
New Column	Number this column to change the order in which the columns display in the results. Insert a "1" next to the desired first column, "2" next to the second desired column, etc.
Column	The current order the columns will display. For example, in the screen shot above, the first column is *Business Unit*, then *Journal Class*, and then *Journal Date*.
Order By	Shows the current sort order of the fields in the results.
Descending	Select this checkbox to sort the selected fields in descending order. A "D" will appear in the descending order.
New Order By	Enter a new sort order number to change the sort order. If the field is the first sort field, enter "1." Then the system will sort the rows based on this field first. To designate the second sort field, enter "2," and so on.

Query Page

The **Query** page shows what records are being used in the query and what fields are available for each record. Each record can be expanded to view all available fields. Fields that are checked will appear in the query results.

Select fields to add to the query either by selecting their checkboxes or clicking <Check All Fields>. <Uncheck All Fields> will not only remove fields from the query, but will remove any and all associated criteria.

Key fields are shown in the query with a key symbol next to them.



Field Name	Field Description
a/z icon	Click once to list fields in alphabetical order. Click again to return to the original sort order.
Alias	The alias name that the system automatically assigns to the chosen records. The first record selected will be assigned "A," the second "B," etc. This helps identify the record used on the **Fields** page.
Hierarchy Join	Click to join a child table to its parent table.
Delete	Click the delete icon to remove a record from the query.

Check All Fields	Click to select all fields in the record. Once a field is selected, the system automatically adds it to the query and it can be viewed on the **Fields** page. This button does not appear when the field names are hidden.
Uncheck All Fields	Click to clear all fields in the record.
Fields	List of fields contained in the record. Select the checkbox to the left of each field to add them to the query.
Add Criteria	Set criteria for the field. This is used to limit data returned even if the field is not displayed. Prompts and expressions may also be created here.
Related Record Join	Click the link to join two records based on a shared field (see **C** in screen shot on previous page). The system will identify related tables and will provide a shortcut to the link.
Expand All Records	Click the plus sign icon to view all fields in the records (see **A** in screen shot on previous page). This button appears only when there is more than one record listed.
Collapse All Records	Click the minus sign icon to hide all fields in the records (see **B** in screen shot on previous page). This button appears only when there is more than one record listed.

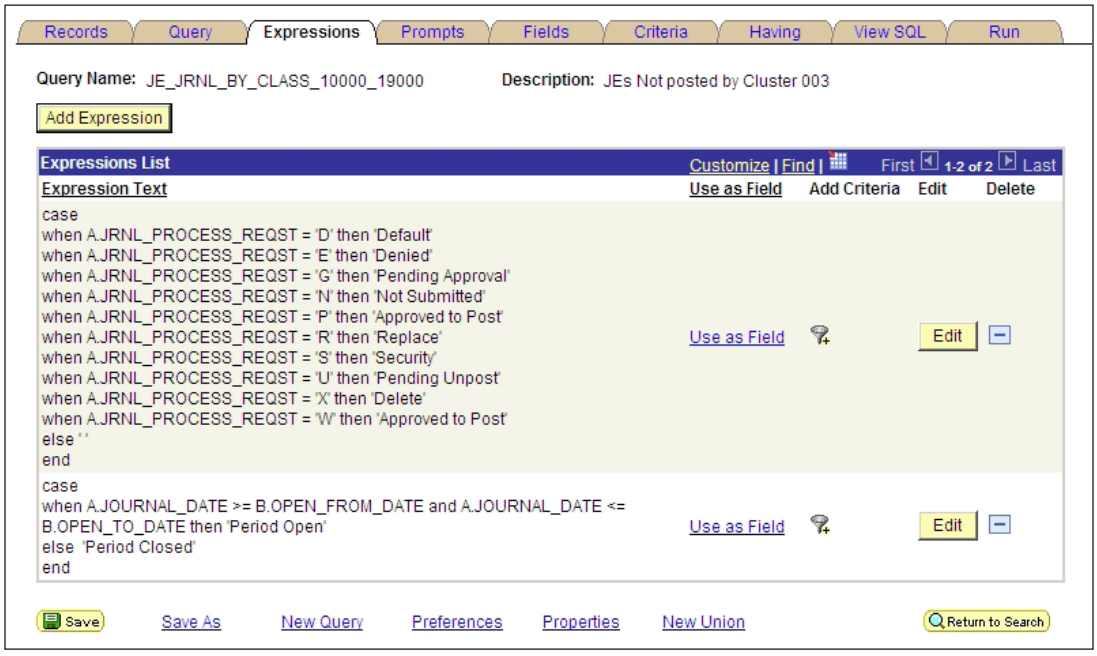
Expressions Page

In Query Manager, expressions can be used in three ways:

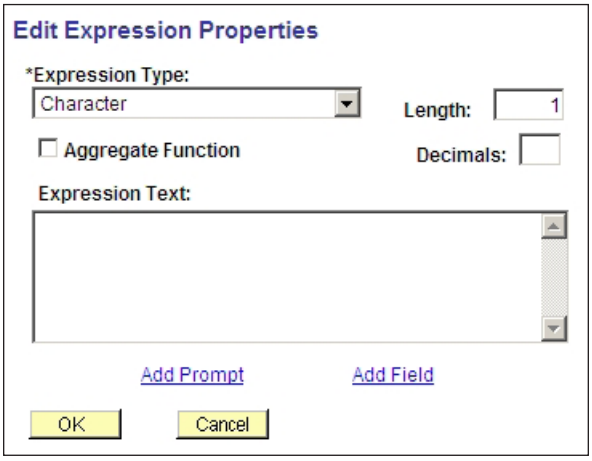
- As comparison values in selection criteria.
- As columns in the query output (new field).
- To write SQL script.

An expression can be worked with as if it were a field in the query. It can be selected for output, the column heading can be changed, or criteria can be run against it.

Expressions can also be calculations that are performed as part of a query. Use them when a value must be calculated that the query does not provide by default (for example, to add the values from two fields together or to calculate a percentage).



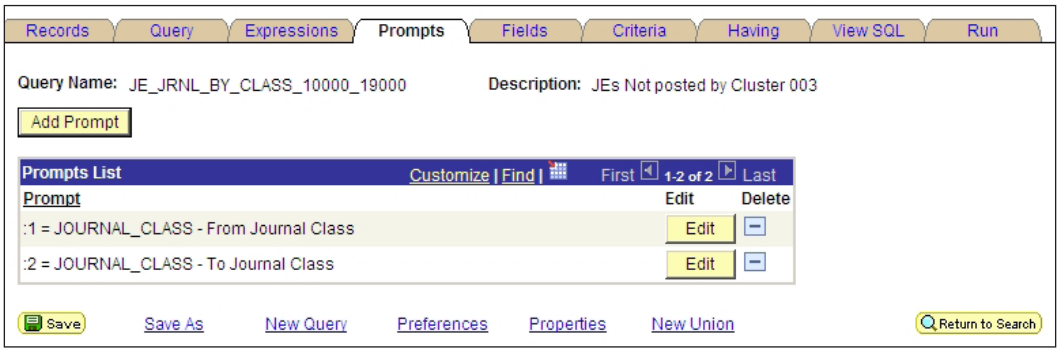
To add an expression, click <Add Expression>.



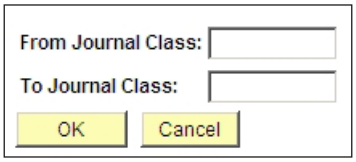
Field Name	Field Description
Expression Type	Type of data to be contained in the results.
Length	Defaults to one digit. The length determines the length of the column which must be increased to the appropriate length.
Aggregate	Select if there is an aggregate function.
Expression Text	Write a SQL statement for the expression. If a prompt or a field will be used as part of the expression, select the appropriate link and then choose the appropriate field or prompt. For example, if the difference between two fields is needed, enter: *Field 1 – Field 2*. For text, single quotes must be included (e.g.,'RRC Name').

Prompts Page

Adding a prompt allows a query to be further refined when it is run. For example, suppose a query needs to be run for different journal classes each time it is run. Before adding the prompt, the query will retrieve all rows from the JRNL_HEADER and JRNL_LN tables based on the criteria defined in the query. Adding a prompt to the query enables a range of class values to be entered that will further limit the results based on the value provided at the time the query is run.



When a query with a prompt is run, a **Prompt** page requests the required value. Enter the value into the field. Prompts are case-sensitive. The query uses the entered value as the comparison value for the criterion that included the prompt.



Prompts can be added from the **Prompts**, **Query**, or **Fields** tabs.

To add a prompt from the **Prompts** tab:

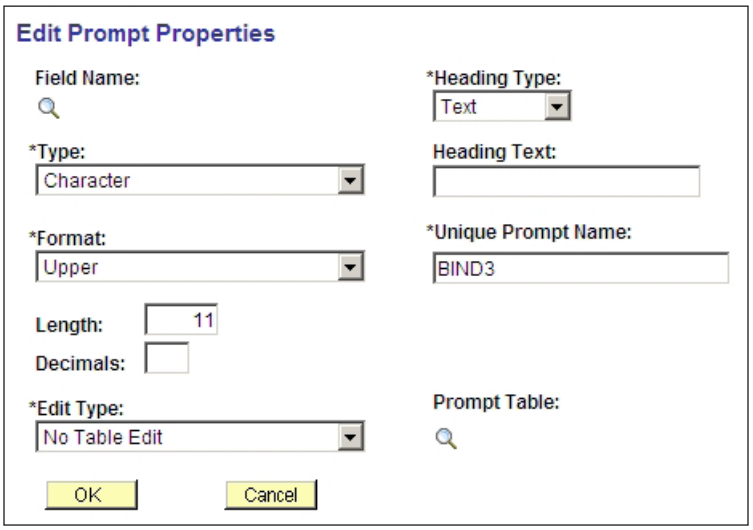
1. Click <Add Prompt>.
2. Click on the magnifying glass next to the field name and select the field you want to apply the prompt to. After selecting a prompt field, the name of the field appears. The query looks to the record definition for information about the field and completes the rest of the page based on its properties.
3. Update the heading text. This is the text that will appear each time the user runs the query.
4. Click <OK>.
5. Repeat for each prompt required.

Prompts can also be added from the **Query** or **Fields** tabs:

1. Select the appropriate field and click <Add Criteria>.
2. Select Condition Type: Equal To.
3. Select Expression Type: Prompt.
4. Click <New Prompt>.
5. Update the heading text. This is the text that will appear each time the user runs the query.
6. Click <OK>.
7. Repeat for each prompt required.

After adding prompts, they will be assigned an alias (:1. :2). To use the prompts in the query, they must be added as criteria.

EDIT PROMPT



Field Name	Field Description
Field Name	Select the field from one of the records used in the query to be a prompt by clicking the magnifying glass icon.
Type	Indicates the type of the field.
Format	Specifies the field format. Over a dozen formats are available, including name, phone, social security number, and zip code.
Length	Indicates the field length.

Prompts Page (cont.)

Decimals Defines the number of decimals that are allowed.

Edit Type Allows a lookup list to be associated with a prompt. This field is used in conjunction with the prompt table and identifies the type of table to be associated with a prompt. Options allow for a drop-down menu of possibilities for the prompt. Options are:

- No table edit (no lookup exists)
- Prompt table (corresponding table)
- Translate table
- Yes/no table

Heading Type Select a heading type for the prompt from the below values. This is the verbiage that will appear next to the prompt when the query is run.

- Text: The free text entered in the field.
- RFT Short: The short name from the record definition.
- RFT Long: The long name from the record definition.

Heading Text Displays the label for the field where the comparison value is entered. To change the text, select "Text" from the **Heading Type** drop-down menu, and enter the new label in the *Heading Text* field.

Unique Prompt Name A default value that Query Manager generates for globalization. Only base-language users can set this value to uniquely identify a query prompt parameter.

Prompt Table If the edit type is "Prompt Table," a prompt table can be selected to use. If the edit type is "Translate Table," the value in the drop-down menu determines the values used. Query Manager assumes that the specified field has translate table values associated with it, and that the field is identified as a *Translate Table* field in its record definition.

If the field being prompted has an associated prompt table (even if it is the *Translate* table), the **Edit Table** drop-down menu shows the available options.

Criteria Page

Because databases store data in records, each individual piece of data can be identified by saying what column (field) and row (transaction) it is in. When a query is created, the data to be included are selected by specifying which columns and rows the system should retrieve.

If the query is run after selecting the fields, the system retrieves all the data in those columns; that is, it retrieves the data from every row in the table or tables. This might be much more data than is wanted or needed. To limit which rows of data are reviewed, add selection criteria to the query.

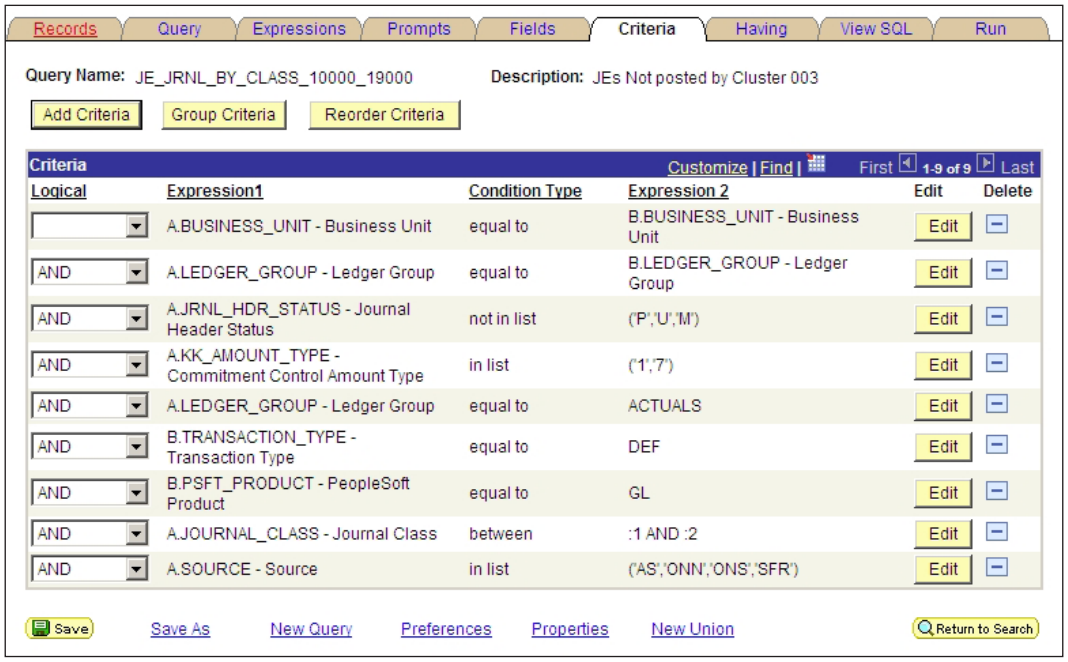
The selection criteria serve as a test that the system applies to each row of data in the tables being queried. If a row matches the criteria, the system retrieves it; if a row does not match, the system does not retrieve it.

Along with the **Query** and **Fields** pages, criteria (static, prompts, or expressions) can be added using the **Criteria** tab. Any field that has criteria associated with it will appear on this page. Other functions available through this page are:

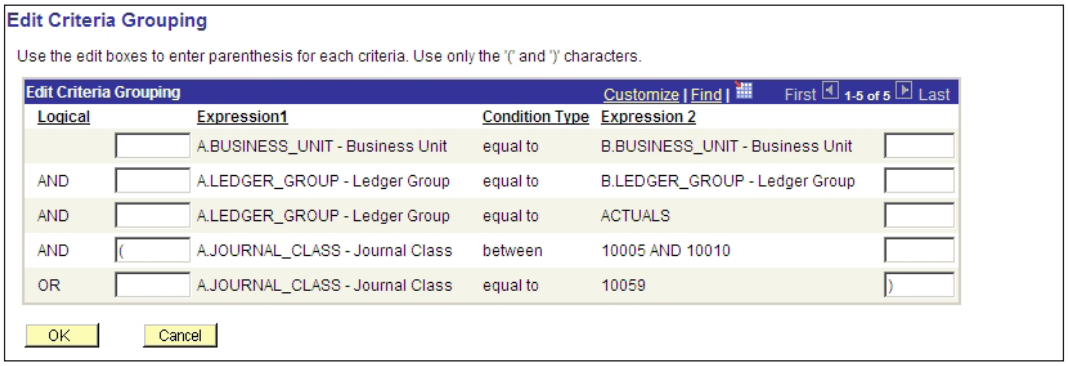
- Reviewing criteria
- Adding criteria (static, prompts or expressions)
- Grouping criteria
- Reordering criteria

Criteria Page (cont.)

Criteria that identify a field in one table as being equal to the same field in another table reflects how the tables are joined. For example: A. Business_Unit = B. Business_Unit. Do not delete these links. Delete the record from the query tab if the record is not needed. Deleting links can result in incorrect data returned.



Field Name	Field Description
Add Criteria	Select additional fields that need to have limiting criteria applied.
Group Criteria	Group criteria to have certain criteria applied in a certain order that may affect the outcome. Example: (2*4)+1= 9 or 2*(4+1)= 10



Reorder Criteria	Changes the order in which criteria are applied to the data. The order that the criterion is applied can affect results.

Logical Represents how criteria rows will be compared with each other. This field is blank for the first criteria. The options are:

AND	Each criteria added defaults to being applied to existing criteria AND the new criteria. Rows returned much match ALL criteria A AND B AND C AND D
AND NOT	Rows returned must contain A, B, and C but no rows can contain D. A AND B AND C AND NOT D
OR	Rows returned will be all records with A, B and C; and any record containing D A AND B AND C OR D
OR NOT	Rows returned will be all records with A, B and C AND any record that does not contain D. A AND B AND C OR NOT D

Expression1 Used to specify what is being compared.

Condition Type Operator. States how *Expression2* will be compared with *Expression1*.

Expression2 Allows a comparison of *Expression1* with a constant, a field from another record, an expression, a subquery, or values entered in a run-time prompt.

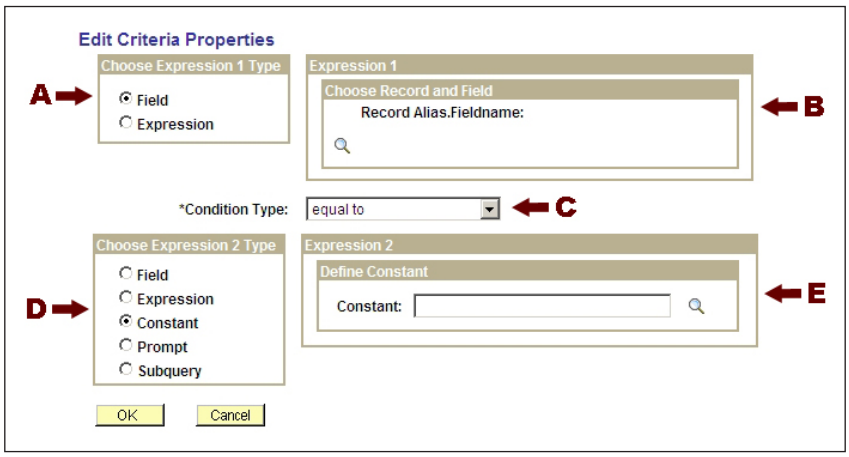
Edit Click to modify the criteria.

Add Criteria

Criteria is a specific combination of values associated with data elements that permits selection of a subset of entries that meet required needs. Criteria can be added in the **Query**, **Fields**, or **Criteria** tabs. The criteria consist of the following parts:

A. Expression 1 Type
B. Expression 1
C. Condition
D. Expression 2 Type
E. Expression 2

Example:



Field Name	Field Description
A. Choose Expression 1 Type	Select "Field" to base the selection criterion on another field's value—usually a field in another record component. When "Field" is selected, a condition type must also be selected (how they will be compared).
B. Expression 1	Choose the record and the field name that will be used in the selection process.
C. Condition Type	Determines how the query compares the values in expression 1 and expression 2. See the Terminology section of this manual for a list of definitions.
D. Choose Expression 2 Type	Identifies the type of data expression 2 will be. The options available are dependent on the condition selected. • Field • Expression • Constant • Prompt • Subquery
E. Expression 2	This identifies the values (constant, range, etc.) that will be used to limit the query results. Lookup lists exist in some situations.

C	D	E
CONDITION TYPE	**EXPRESSION 2 TYPE (Options)**	**EXPRESSION 2**
Equal to/Not Equal to Greater Than/ Not Greater Than Less Than/Not Less than	Field Expression Constant Prompt SubQuery	Field 1. Use Look up to select a field. Expression 2. Use Look up to select expression. 3. Click <New Expression> to create an expression. Constant 1. Enter a value. Prompt **Select a prompt:** 1. Click the magnifying glass and select prompt. **Add Prompt:** 1. Click <Add Prompts>. 2. Click the magnifying glass next to the field button. 3. Select the field name. 4. Update the heading text. 5. Click <OK>.
Like/Not Like	Constant Prompt	Constant value 1. Enter a value. Prompt **Select a prompt:** 2. Click the magnifying glass and select prompt. **Add Prompt:** 3. Click <Add Prompts>. 4. Click the magnifying glass next to the field button. 5. Select the field name. 6. Update the heading text. 7. Click <OK>.
IS NULL/Is not null	NO OPTIONS	
In List	In List SubQuery	Create a List: 1. Select Look up . 2. Select values: • Click <Add Value> (if Translate table exists, options will appear) OR • Enter a value and click <Add Value> OR • Search for values. 3. Once List is complete, click <OK>.
In Tree/Not In Tree	Tree Option	Choose Tree Node: 1. Click <New Node> List. 2. Search for the appropriate tree (DeptID, Fund, or Account). 3. Select the tree with the appropriate effective date. 4. Drill to the appropriate Node/Nodes and select. 5. Click <OK> to approve node selection. 6. Click <OK> to save criteria.

Add Criteria (cont.)

CONDITION TYPES

between/ not between	The value in the selected record field falls between/not between two comparison values. The range is inclusive.
equal to/not equal to	The value in the selected record field is equal to/not equal to the comparison value.
exists/does not exist	This operator is different from the others in that it does not compare a record field to the comparison value. The comparison value is a subquery. If the subquery returns any data, the query returns the corresponding row.
greater than	The value in the record field is greater than the comparison value.
not greater than	The value in the record field is less than or equal to the comparison value.
in list/not in list	The value in the selected record field matches one of the comparison values in a list/not in a list.
in tree/not in tree	The value in the selected record field is a tree node/is not a tree node.
is null/is not null	The selected record field does not have a value in it. No comparison value for this operator. Key fields, required fields, character fields, and numeric fields do not allow null values.
less than	The value in the record field is less than the comparison value.
not less than	The value in the record field is greater than or equal to the comparison value.
like/not like	The value in the selected field matches a specified string pattern/does not match a specific string. The comparison value may be a string that contains wildcard characters. The wildcard characters that Query Manager recognizes are % and _. % matches any string of zero or more characters. For example, C% matches any string starting with "C," including C alone. _ matches any single character. For example, _ones matches any five-character string ending with "ones," such as Jones or Cones. Other wildcard options include wildcard characters supported by the database software used. See the documentation for the database management system used for details.

TO ADD CRITERIA

From the Query or Field tab:

1. Click the filter next to the field.
2. Select *Condition Type*.
3. Select the appropriate value (constant value, prompt, tree, list, etc. – these options are dependent upon *Condition Type*).
4. Fill in the expression 2 with the corresponding value(s).
5. Click <OK>.

From the Criteria tab:

1. Click <Add Criteria>.
2. Search for and select field name.
3. Select *Condition Type*.
4. Select the appropriate value (constant value, prompt, tree, list, etc. – these options are dependent upon *Condition Type*).
5. Fill in the expression 2 with the corresponding value(s).
6. Click <OK>.

Having Page

This feature would be used in situations where a calculation (aggregate) function is used and additional criteria to limit the results on the same field is needed. For example, to calculate the total salary of each department and then only select those departments whose salary is greater than $100,000.00.

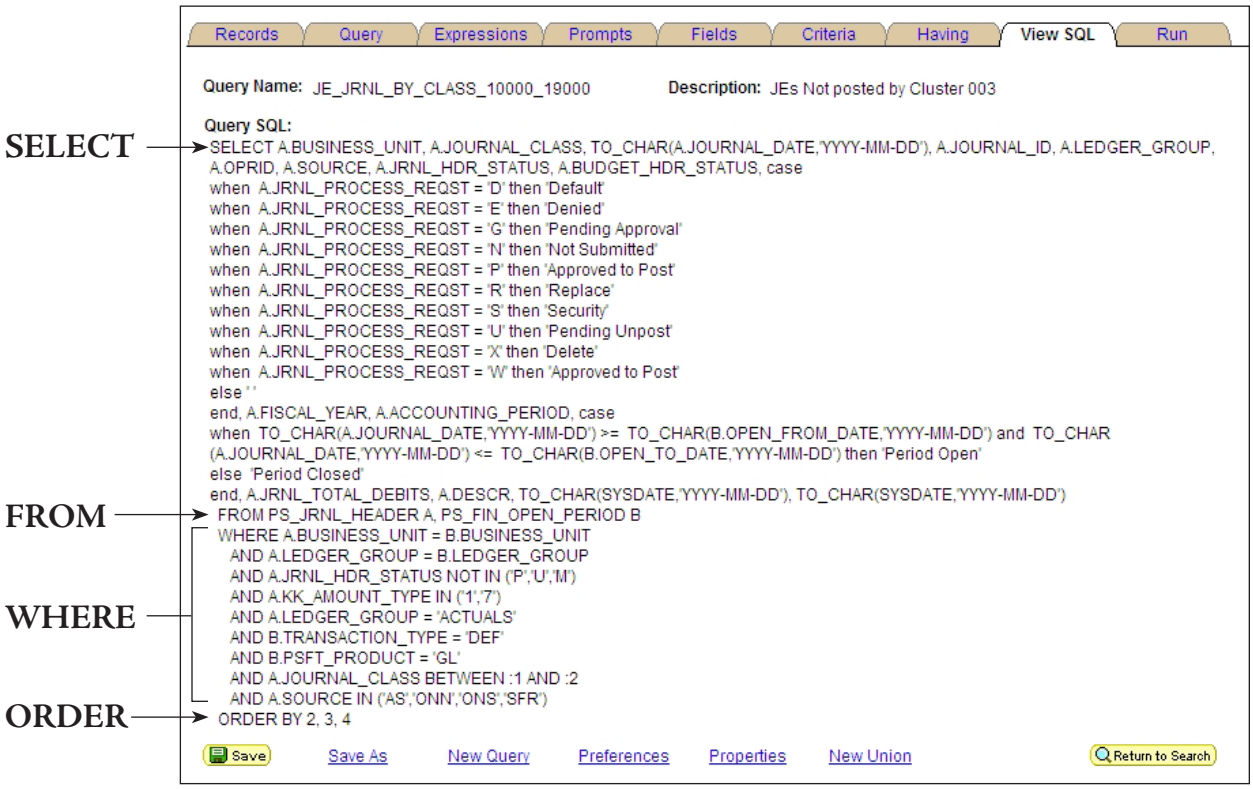
The system first aggregates the data and then performs the selection based on the HAVING criteria.

When the add-criteria icon from the **Fields** or **Query** tab is selected for an aggregate field, new criteria is added to the **Having** tab instead of the **Criteria** tab. Add selection criteria using the **Having** tab in the same way that selection criteria is added using the **Criteria** tab.

Having criteria are separated from simple criteria. They are accessed as follows:

- Having criteria are accessed using either the AddHavingCriteria QuerySelect method or HavingCriteria QuerySelect property.
- Simple criteria are accessed using either the AddCriteria QuerySelect method or the Criteria QuerySelect property.

The **View SQL** screen shows the query in sentence-like structure. This information cannot be edited from this screen.

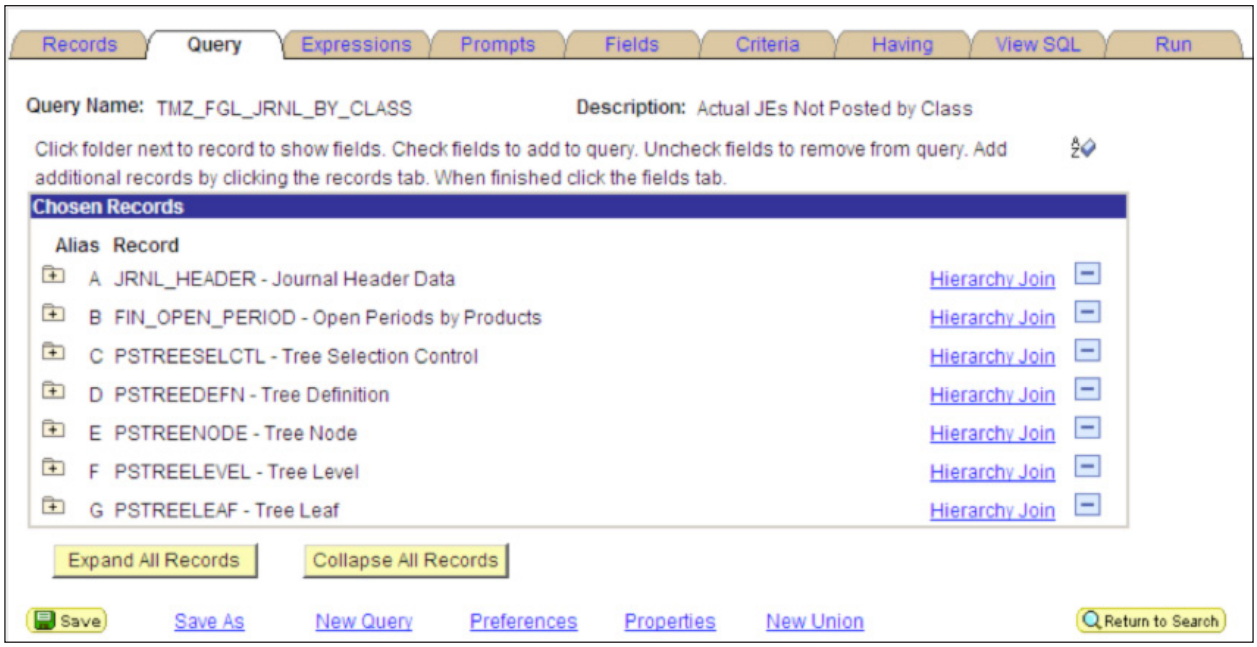


SELECT	Fields: What fields will show in the query?
FROM	Table: What records (tables) are being used?
WHERE	Criteria: What limitations are being placed on the data being retrieved (criteria)?
ORDER	How are the results sorted?
HAVING	Include only those aggregated rows of data having this criteria.
GROUP BY	How is the criteria applied?

This can be read in a sentence-like structure:

SELECT these fields FROM these tables WHERE this criterion is met.

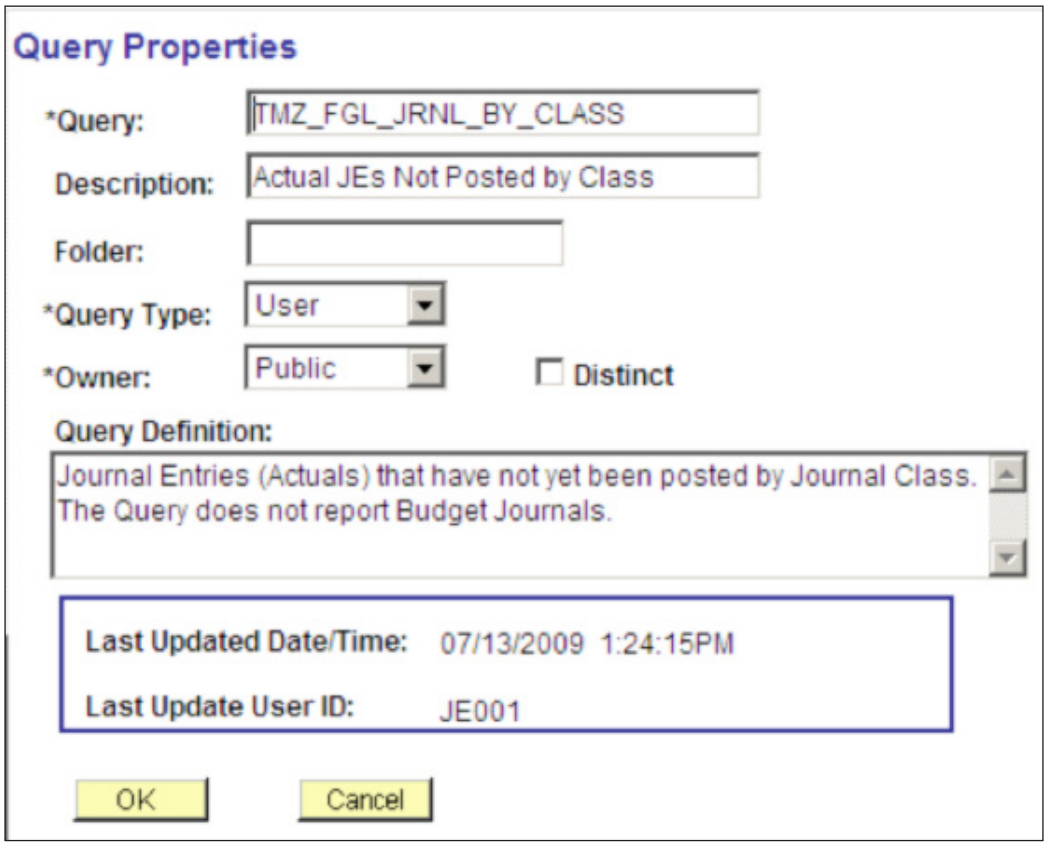
Query Options



Field Name	Field Description
Save As	Save changes to the existing query.
New Query	Create a new query from scratch.
Preferences	Determine if joins will auto join or not.
Properties	Modify query information such as name, description, and folder.

- Query
  Change query name.
- Description
  Change query description.
- Folder
  Change or delete the folder associated with the query.
- Query Type
  Leave at default.
- Owner
  Change the default from public to private. For example, if a public query were used as a basis, but when the save as was performed the owner was not updated from public to private. The properties may be accessed to change the owner from public to private.
- Query Definition
  The long description may be updated.

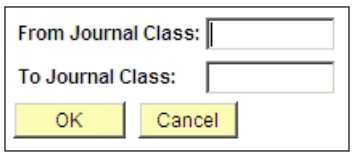
- Last Updated Date/Time
  Date that the query was last updated.
- Last Update User ID
  User ID of the individual who last edited the query.
- Distinct
  Define the query so that only one row is returned for all similar date. For example, if a journal ID has 20 ChartField strings, and you only want to see one row for the transaction based on Fund, DeptID, and Program, then select *Distinct* to return only one row.



- New Union
  Link two queries.

Running Queries

When a query is run, the system looks at all the rows in the record(s) and returns only those that meet the requirements specified in a query—or all rows if no criteria are specified (this is called a list query since the results are a list of all the data in the record). To run a query, click the **Run** tab. The query then executes and displays the results. While the query runs, run-time prompts that require user input may appear if they were built into the criteria.

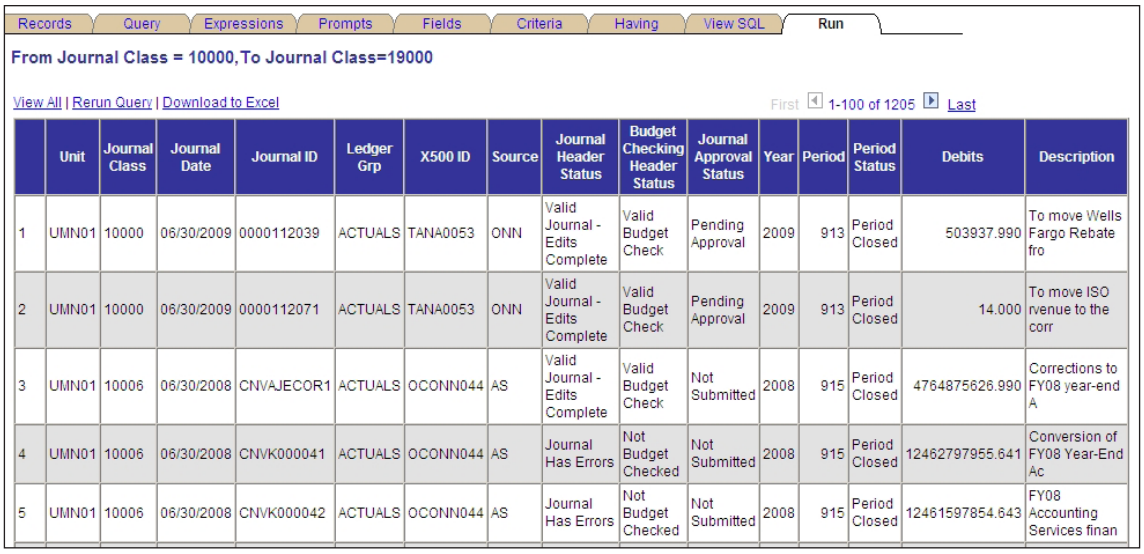


Remember the query results (data set) are static. If the data in the database changes five minutes after the query is run, the query results will remain the same, unless the query is rerun.

Depending on the data in the system or the information supplied in the limits or run-time prompts, the data set may be empty. Empty data sets may also be a result of security restrictions.

If access to view data within the query tool is not allowed, the data set may display as empty even if data is present. This is referred to a "null" query set.

When data meet the requirements of the query, they are included in the data set. The upper right-hand corner of the data set will display the number of records returned. Unlike other PeopleSoft search results, the query output can display more than 300 rows as a result of a fetch on the database.



Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

From Journal Class = 10000, To Journal Class=19000

View All | Rerun Query | Download to Excel

First 1-100 of 1205 Last

	Unit	Journal Class	Journal Date	Journal ID	Ledger Grp	X500 ID	Source	Journal Header Status	Budget Checking Header Status	Journal Approval Status	Year	Period	Period Status	Debits	Description
1	UMN01	10000	06/30/2009	0000112039	ACTUALS	TANA0053	ONN	Valid Journal - Edits Complete	Valid Budget Check	Pending Approval	2009	913	Period Closed	503937.990	To move Wells Fargo Rebate fro
2	UMN01	10000	06/30/2009	0000112071	ACTUALS	TANA0053	ONN	Valid Journal - Edits Complete	Valid Budget Check	Pending Approval	2009	913	Period Closed	14.000	To move ISO revenue to the corr
3	UMN01	10006	06/30/2008	CNVAJECOR1	ACTUALS	OCONN044	AS	Valid Journal - Edits Complete	Valid Budget Check	Not Submitted	2008	915	Period Closed	4764875626.990	Corrections to FY08 year-end A
4	UMN01	10006	06/30/2008	CNVK000041	ACTUALS	OCONN044	AS	Journal Has Errors	Not Budget Checked	Not Submitted	2008	915	Period Closed	12462797955.641	Conversion of FY08 Year-End Ac
5	UMN01	10006	06/30/2008	CNVK000042	ACTUALS	OCONN044	AS	Journal Has Errors	Not Budget Checked	Not Submitted	2008	915	Period Closed	12461597854.643	FY08 Accounting Services finan

Link Name	Link Description
View All	View all rows returned.
Rerun Query	Click to rerun a query preview. If changes have been made to a query since the last preview, it must be rerun to see the effect of the changes. Note: If it is not desirable to rerun the query every time it is previewed, deactivate the *Enable Auto Preview* feature. When this feature is active, a query automatically runs each time the **Run** tab is selected. To activate *Enable Auto Preview*, click <Preferences> and select *Enable Auto Preview*. (The <Preferences> link is available on every page except the **Run** page.)

Locating a Record

Query Manager enables queries with multiple-record joins. Joins retrieve data from more than one record, presenting the data as if it came from one record. PeopleSoft Query links tables based on common fields, and links rows on tables by common fields in the shared columns.

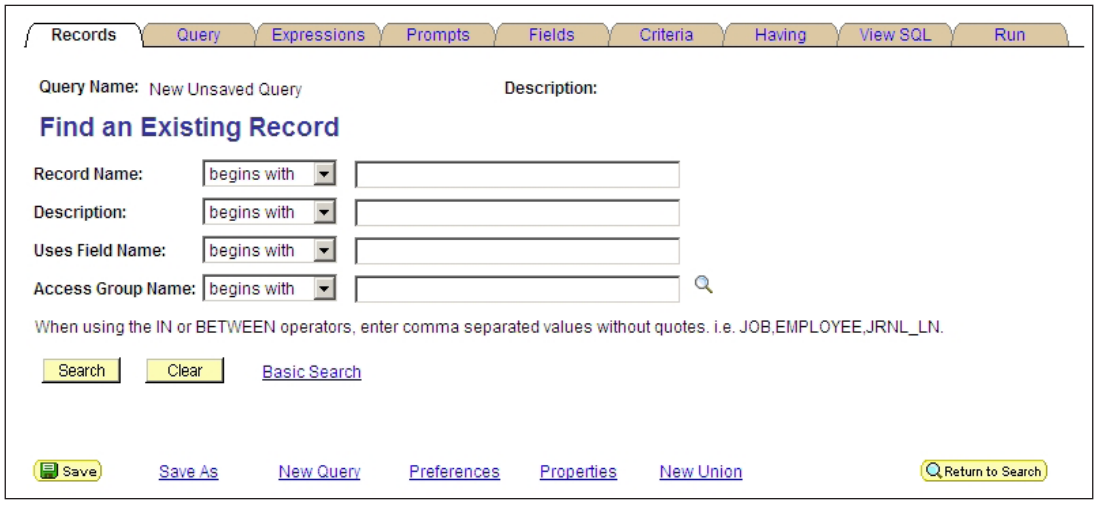
BASIC SEARCH

Allows a search using the "begins with" condition on the record.

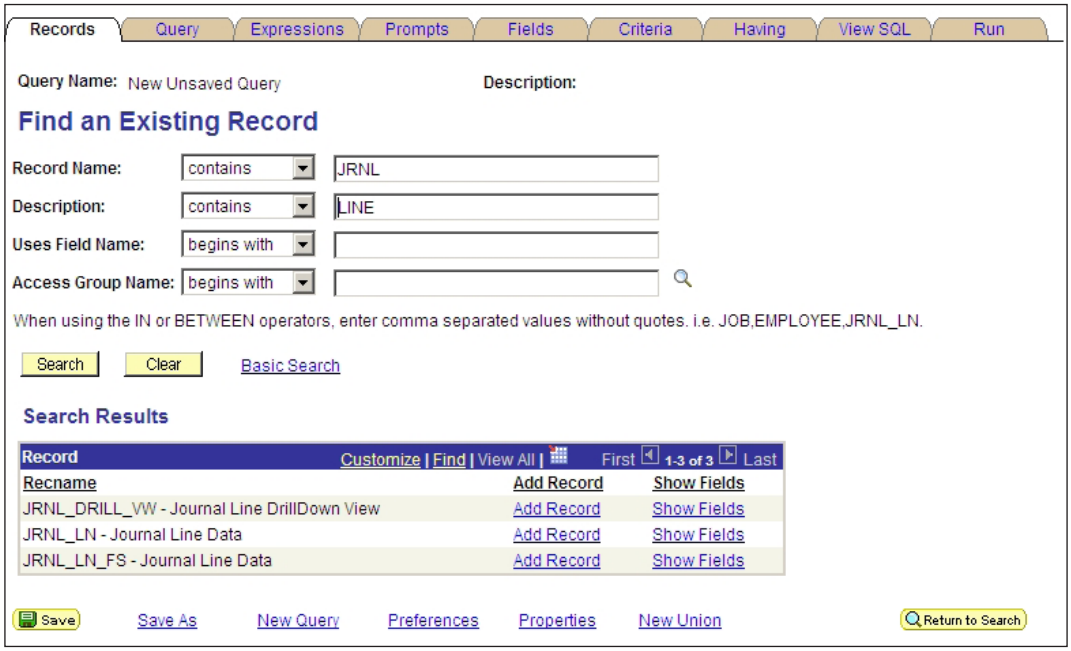
Field Name	Field Description
Access Group Name	A grouping of records used by a particular module. Selecting a particular access tree returns every query related to that particular module.
Contains Field Name	Retrieves all queries that use the field identified.
Description	Description of the query.
Record Name	Retrieves all queries using a particular record (table).

ADVANCED SEARCH

The advanced search allows greater search flexibility. Each of the four basic-search options are available, but in addition to searching by "begins with," advanced search allows searches by other conditions (>, >=, =, < ,<=, contains, exists, in, between, and not =). The advanced search also allows searching on multiple criteria at the same time.



Search Results



Show Fields

Before adding a record, it is a best practice to review the fields that are contained within the record to determine if the fields needed are contained. It is also important to determine which fields are key fields.

Key fields are the field(s) that make the record unique. They are shown in the query with a key symbol next to them. When viewing the **Show Fields** page of the record, they are identified with a "Y" under *Key Field*. Typically (but not always), records are joined on key fields.

When joining records, the records each include at least one field that contains comparable data. For example, if a vendor record and a voucher record need to be joined, each record must contain a common element such as a *Vendor ID* field to serve as a field on which the data can be matched.

When records contain the same fields, the system will automatically identify them as potential joins.

Records can be joined on multiple fields so long as the fields have the potential to supply matching information.

Fields for record JRNL_LN - Journal Line Data:

Fieldname	Customize | Find | First 1-61 of 61 Last
Key	Description
Y	BUSINESS_UNIT - Business Unit
Y	JOURNAL_ID - Journal ID
Y	JOURNAL_DATE - Journal Date
Y	UNPOST_SEQ - UnPost Sequence
Y	JOURNAL_LINE - GL Journal Line Number
Y	LEDGER - Ledger
	ACCOUNT - Account
	ALTACCT - Alternate Account
	DEPTID - DeptID
	OPERATING_UNIT - Operating Unit
	PRODUCT - Product
	FUND_CODE - Fund Code
	CLASS_FLD - Class Field
	PROGRAM_CODE - Program Code
	BUDGET_REF - Cost Share
	AFFILIATE - Affiliate
	AFFILIATE_INTRA1 - Fund Affiliate
	AFFILIATE_INTRA2 - DeptID Affiliate
	CHARTFIELD1 - ChartField 1
	CHARTFIELD2 - ChartField 2
	CHARTFIELD3 - Fin EmplID
	BOOK_CODE - Book Code
	GL_ADJUST_TYPE - Adjustment Type
	BUDGET_PERIOD - Budget Period
	SCENARIO - Scenario
	CURRENCY_CD - Currency Code
	BUSINESS_UNIT_PC - PC Business Unit

Once a record is identified and selected, a prompt will display requesting that the type of join (standard or left outer) and which record it is to be joined to will display.

Select join type and then record to join with JRNL_LN - Journal Line Data.
Join Type
Join to filter and get additional fields (Standard Join)
Join to get additional fields only (Left outer join)
Join Record
Customize | Find |
First 1-2 of 2 Last
A = JRNL_HEADER - Journal Header Data
B = FIN_OPEN_PERIOD - Open Periods by Products
Cancel

STANDARD JOIN (MOST COMMON)

Standard joins tell a query that rows from one of the joined tables correspond to rows in the other table, on the basis of the data in the joined fields. When a query with an inner join is run, only those rows where a common value exists in both of the joined tables will be included in the query operations.

Use an inner join to return only those rows from both tables in the join that match on the joining field.

LEFT OUTER JOIN

In a left outer join, the query includes all the rows from the first table in the SQL statement FROM clause, and only those rows from the other table where the joining field contains values common to both tables.

Because some of the rows on one side of an outer join will not have corresponding rows from the other table, some of the fields returned in the query results from that other table will be empty when the rows do not correspond.

Use an outer join to have all the rows from one of the tables in the join be included in the results, and to have the query return only those rows from the other table that match the first table on the joining field.

Joins (cont.)

Example of data contained in two records and how the results differ based on the join.

RECORD 1

Bus Unit	DeptID	Employee Name
UMN01	10000	Smith, Steve
UMN01	10050	Jones, John
UMN01	10100	Adams, Alan
UMN01	15114	Williams, Walter

RECORD 2

Bus Unit	DeptID	Date	Amount
UMN01	10050	07/31/05	1000.00
UMN01	10100	06/30/05	800.00
UMN01	15114	07/31/05	300.00

STANDARD JOIN

Rows will only be returned where data exists in both records.

Bus Unit	DeptID	Employee Name	Amount
UMN01	10050	Jones, John	1000.00
UMN01	10100	Adams, Alan	800.00
UMN01	15114	Williams, Walter	300.00

(10000 is missing from results as it does not exist in both records.)

LEFT OUTER JOIN

Rows will only be returned if they exist in either table.

Bus Unit	DeptID	Employee Name	Amount
UMN01	10000	Smith, Steve	
UMN01	10050	Jones, John	1000.00
UMN01	10100	Adams, Alan	800.00
UMN01	15114	Williams, Walter	300.00

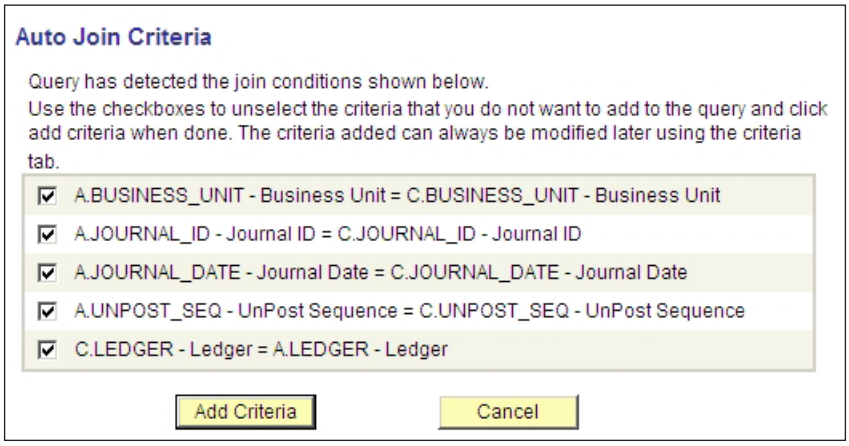
Caution

- Table joins that are set up incorrectly could result in misleading queries, broken queries, or poor performance.
- A good understanding of the fields contained in the tables, which fields are key fields, and the results desired is essential in joining tables correctly.

AUTO JOIN CRITERIA

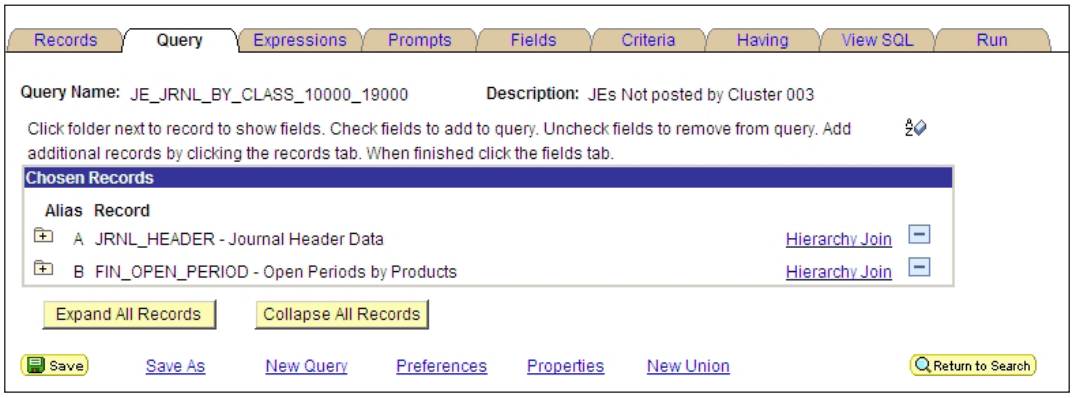
When a join and record are selected, the auto join criteria will appear. The system will locate field names that are the same in each table and will join the tables on each field selected. Deselect fields that should not be joined.

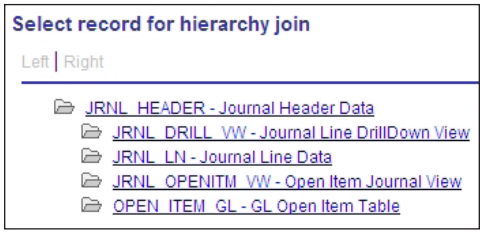
For example: The *Ledger* field in the JRNL_HEADER table is not the same *Ledger* field as in the JRNL_LN table. Therefore, it should be unchecked.


Auto Join Criteria
Query has detected the join conditions shown below.
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.
A.BUSINESS_UNIT - Business Unit = C.BUSINESS_UNIT - Business Unit
A.JOURNAL_ID - Journal ID = C.JOURNAL_ID - Journal ID
A.JOURNAL_DATE - Journal Date = C.JOURNAL_DATE - Journal Date
A.UNPOST_SEQ - UnPost Sequence = C.UNPOST_SEQ - UnPost Sequence
C.LEDGER - Ledger = A.LEDGER - Ledger
Add Criteria
Cancel

HIERARCHY JOIN

Once one table is selected, a hierarchy join can be created by clicking <Hierarchy Join>. This will bring up all the child records associated with the original record (if any exist).




Select record for hierarchy join
Left | Right
JRNL_HEADER - Journal Header Data
JRNL_DRILL_VW - Journal Line DrillDown View
JRNL_LN - Journal Line Data
JRNL_OPENITM_VW - Open Item Journal View
OPEN_ITEM_GL - GL Open Item Table

Note: Hierarchy joins do not show links on the criteria tab.

Step-by-Step Directions for PeopleSoft Query

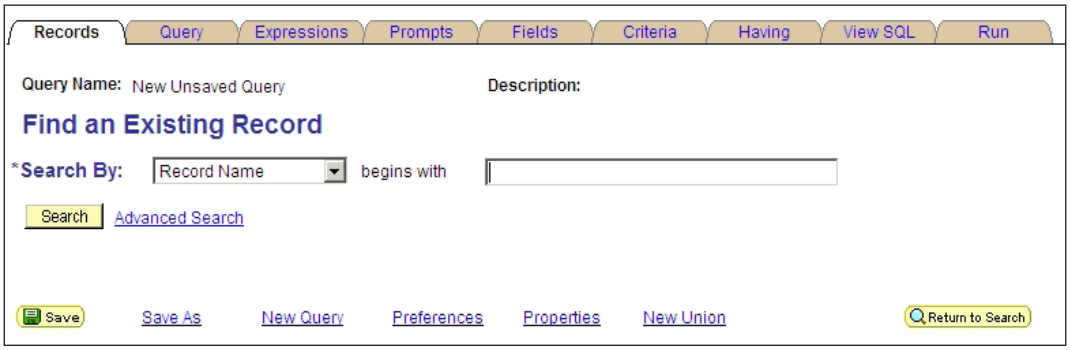
CREATING A NEW QUERY

In many situations, existing queries can be used as a basis and then modified to fit the needs of the user. In others, a completely new query may be required or be beneficial. Record names are consistent and allow users to see available records by module (Procurement, Accounts Payable, Asset Management, etc.).

When creating a query, the first step is to develop a plan of action.

Identify the Following	Ask This Question	Result
Goal of query	What is the purpose of the query?	
Records	What tables contain the required fields? What key fields exist in the records?	
Fields	Which fields need to be included in the output?	
Sort order	Which sort will provide the most benefit?	
Field order	In what order should the fields appear (from left to right)?	
Criteria	How should the results be limited each time the query is run?	
Prompts	Are there limitations that should be applied at the time the query is run?	
Expressions	Are there calculations that should be performed or aggregate functions that should be performed?	

To create a new query, navigate to: **Reporting Tools > Query > Query Manager**. Then click <Create New Query>.



QUERY WITH ONLY ONE RECORD

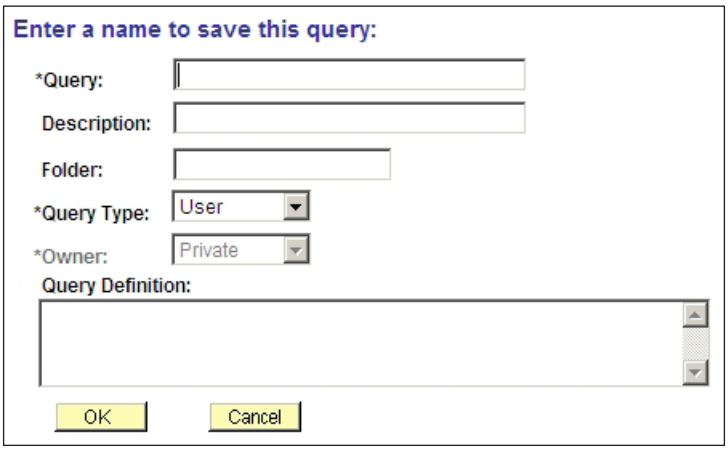
1. Locate the record to use in query and click <Select Record>.
2. On the **Query** tab, select the fields to add to the query.
3. Add any criteria to the query.
4. Click the **Prompt** tab to enter any run-time prompts.
5. Click the **Fields** tab to change the field or sort order, header text, or setup aggregates.
6. Click the **Expressions** tab or **Having** tab to define advanced criteria as needed.
7. Click the **Run** tab to view the results.

Step-by-Step Directions for PeopleSoft Query (cont.)

QUERY WITH TWO (OR MORE) RECORDS.

1. Find the record to use in the query and select it.
2. Find additional record(s) to use in the query and select them.
3. Select the type of join (standard or left outer) and select the record to join the record to.
4. Select fields from the **Query** tab.
5. Set up criteria as needed.
6. If additional joins are necessary, repeat steps 2 through 5 until all records are added to the query.
7. Click the **Criteria** tab to add or change criteria.
8. Click on the **Fields** tab to change any fields to aggregates or to change heading text, the order of the fields, or the sort order.
9. Click the **Expressions** tab or **Having** tab to define advanced criteria as needed.
10. Click the **Run** tab to view the results.

Once a query is defined (or partially defined), save it by clicking <Save> at the bottom of the screen.



Field Name	Field Description
Query Name	Name the query in such a way as it will make sense to anyone using it. Best practice would be to develop a naming convention.
Description	Change the default description based on the query being developed. Keep in mind that this field is searchable, so the method of entering a description would be best served by a standard description.
Folder	Folders can be used to organize private queries. Develop a folder structure that will enable organization of queries for easy access. Queries with folders associated that are copied to other users will maintain the folder structure. Best practice would be for units to develop common folder structures used by all when sharing queries. • GL • AR • AP This field is also available to limit query results when performing searches.

Saving a New Query (cont.)

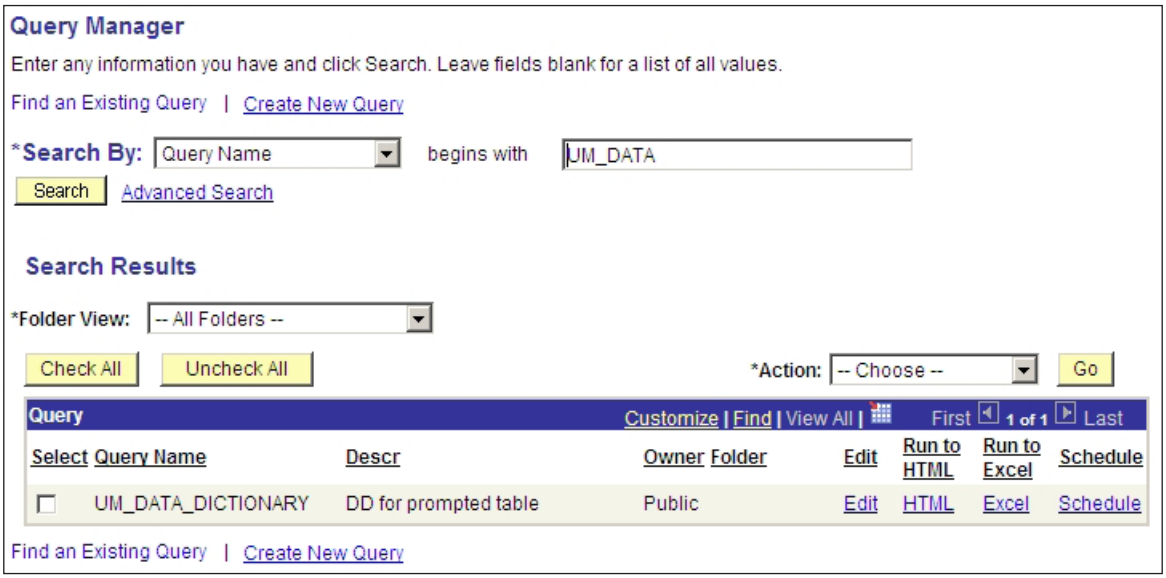
Query Type	Leave as default.
Owner	"Private" will be the only option. Users can only create private queries. Queries that have an owner identified as "Public" are centrally defined queries that can be run but not edited. This field is also available to limit query results when performing searches.
Query Definition	Area where detailed description can be entered. Identify the purpose of the query, criteria, special calculations, summarization, prompts, etc. This field is vital to understand what rows of data the query will return, especially when sharing queries with other users.

Understanding Query Results: UM Data Dictionary

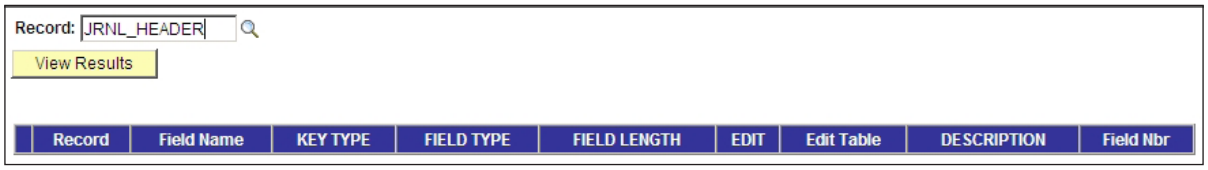
In many situations, the data that is contained within the query will be self-evident. In some situations, however, the query may return results that are difficult to interpret.

Bring up the query, view the **Query** tab, and the records (tables) will be available. Note the record name and then search the UM Data Dictionary for the record to view what information is reported on (what data the fields actually report on).

Search For UM_DATA_DICTIONARY.


Query Manager
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Query | Create New Query
*Search By: Query Name begins with UM_DATA
Search Advanced Search
Search Results
*Folder View: -- All Folders --
Check All Uncheck All *Action: -- Choose -- Go
Query Customize | Find | View All | First 1 of 1 Last
Select Query Name Descr Owner Folder Edit Run to HTML Run to Excel Schedule
UM_DATA_DICTIONARY DD for prompted table Public Edit HTML Excel Schedule
Find an Existing Query | Create New Query

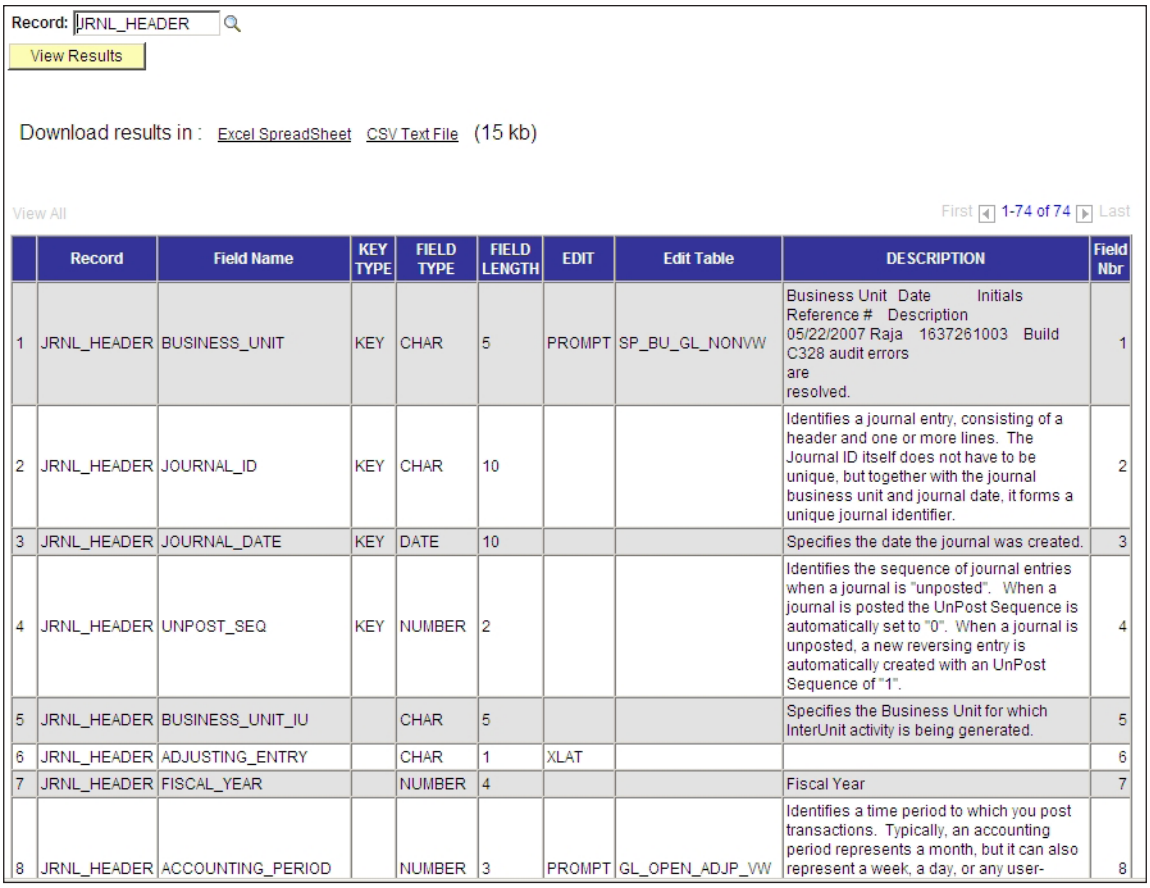
Run the query and then enter the record (table name).


Record: JRNL_HEADER
View Results
Record Field Name KEY TYPE FIELD TYPE FIELD LENGTH EDIT Edit Table DESCRIPTION Field Nbr

The results will show all the fields that are contained within the record, what type of information is maintained (numerical, character, date, currency, etc.), and additional information.

Some of the descriptions are default PeopleSoft descriptions; others have been updated to clarify the use of the field at the University.

Understanding Query Results: UM Data Dictionary (cont.)



Record: JRNL_HEADER

View Results

Download results in : Excel SpreadSheet CSV Text File (15 kb)

View All First 1-74 of 74 Last

	Record	Field Name	KEY TYPE	FIELD TYPE	FIELD LENGTH	EDIT	Edit Table	DESCRIPTION	Field Nbr
1	JRNL_HEADER	BUSINESS_UNIT	KEY	CHAR	5	PROMPT	SP_BU_GL_NONVW	Business Unit Date Initials Reference # Description 05/22/2007 Raja 1637261003 Build C328 audit errors are resolved.	1
2	JRNL_HEADER	JOURNAL_ID	KEY	CHAR	10			Identifies a journal entry, consisting of a header and one or more lines. The Journal ID itself does not have to be unique, but together with the journal business unit and journal date, it forms a unique journal identifier.	2
3	JRNL_HEADER	JOURNAL_DATE	KEY	DATE	10			Specifies the date the journal was created.	3
4	JRNL_HEADER	UNPOST_SEQ	KEY	NUMBER	2			Identifies the sequence of journal entries when a journal is "unposted". When a journal is posted the UnPost Sequence is automatically set to "0". When a journal is unposted, a new reversing entry is automatically created with an UnPost Sequence of "1".	4
5	JRNL_HEADER	BUSINESS_UNIT_IU		CHAR	5			Specifies the Business Unit for which InterUnit activity is being generated.	5
6	JRNL_HEADER	ADJUSTING_ENTRY		CHAR	1	XLAT			6
7	JRNL_HEADER	FISCAL_YEAR		NUMBER	4			Fiscal Year	7
8	JRNL_HEADER	ACCOUNTING_PERIOD		NUMBER	3	PROMPT	GL_OPEN_ADJP_VW	Identifies a time period to which you post transactions. Typically, an accounting period represents a month, but it can also represent a week, a day, or any user-	8

Field Name	Field Description
Record	Record name.
Field_Name	Name of the field in the query.
Key Type	Primary key fields are identified by the word "key" in this field.
Field Type	Date, number, and character.
Field Length	Number of characters allowed in the field.
Edit	Identifies if there is a prompt, translation, or yes/no table associated.
Edit Table	Identifies the name of the prompt table.
Description	Additional information clarifying what information the field contains.

Organizing Queries: Copying a Query to Another User

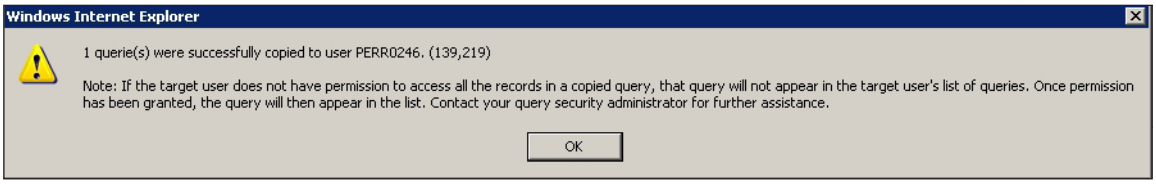
The Query Manager enables copying a query from one user's list of queries to another user's list of queries. Only nonpublic queries can be copied to another user's list of queries.

If the target user does not have permission to access all of the records in a copied query, that query will not appear in the target user's list of queries. When permission has been granted, the query will appear in their list.

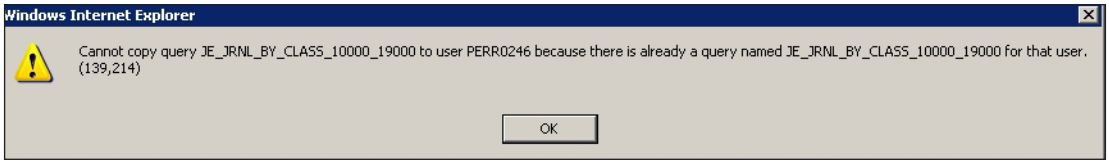
To copy a query to another user's list of queries:

1. Navigate to: **Reporting Tools > Query > Query Manager**.
2. On the Query Manager search results page, select the query or queries to be copied.
3. Select "Copy to User" from the **Action** drop-down menu.
4. Click <Go>. The **Enter User ID** page appears.
5. In all caps, enter the user ID of the user to whom the query is to be copied.
6. Click <OK>.

The following message will appear:


Windows Internet Explorer
1 querie(s) were successfully copied to user PERR0246. (139,219)
Note: If the target user does not have permission to access all the records in a copied query, that query will not appear in the target user's list of queries. Once permission has been granted, the query will then appear in the list. Contact your query security administrator for further assistance.
OK

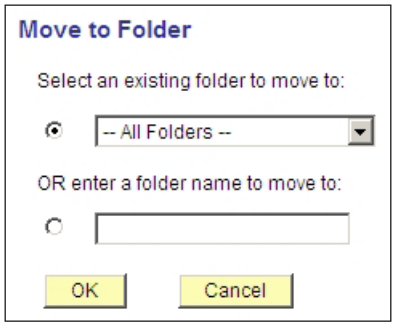
If the query already exists for the user, a different message will appear:


Windows Internet Explorer
Cannot copy query JE_JRNL_BY_CLASS_10000_19000 to user PERR0246 because there is already a query named JE_JRNL_BY_CLASS_10000_19000 for that user. (139,214)
OK

Organizing Queries: Moving a Query to a Folder

Organizing queries in folders can facilitate easier access to queries. To move a query to a folder:

1. Navigate to: **Reporting Tools > Query > Query Manager**.
2. On the Query Manager search results page, select the query or queries to be moved to an organization folder.
3. Select "Move to Folder" from the **Action** drop-down menu.
4. Click <Go>. The **Move to Folder** page appears.



5. Select one of the following:
   - An existing folder to move to: From the drop-down menu, select the folder to which to move the queries. The folders available will be unique to each user.

   OR

   - Enter a folder name to move to: Enter the name for a new folder to which to move the queries. These folders are unique to each user.
6. Click <OK>.

To change the name of a private query, search for the query and select the corresponding checkbox. Then select "Rename Selected" from the **Action** drop-down menu, and enter the new name of the query on the **Rename Queries** page.

Scheduling

In many situations, it is helpful to schedule the queries to run overnight.

The scheduling option can also be used to help organize and distribute queries. Some of the activities that can be performed thorough the scheduling options are:

- Setup recurring queries.
- Select the format output (PDF, web, html, txt).
- Select the location of the results.
- Distribute the query results to select user or users.

The benefits to using the scheduling features are many. If there are monthly queries that are needed, they can be scheduled to run overnight or early in the morning reducing the manual process of running the report.

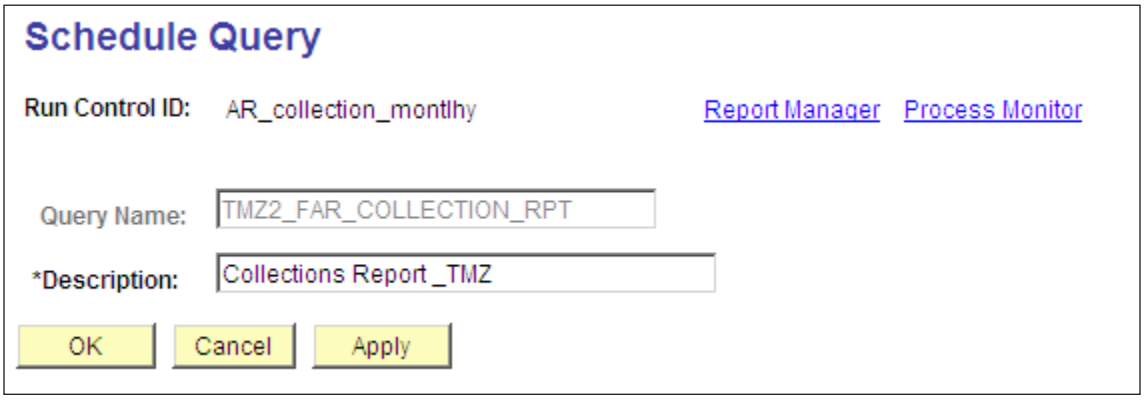
A process request enables you to submit a job or process to run. The **Schedule Query** page submits a process request and brings up the **Process Request** page, which enables you to specify such variables as where to run the process and in what format to generate the output based on a run control ID.

RUN CONTROL

When defining a schedule for queries, a run control will need to be entered. Run controls are determined by the individual and by the query, and can be useful when similar schedules are used. That way, whenever the group needs to be forwarded the same report, the run control can be used.

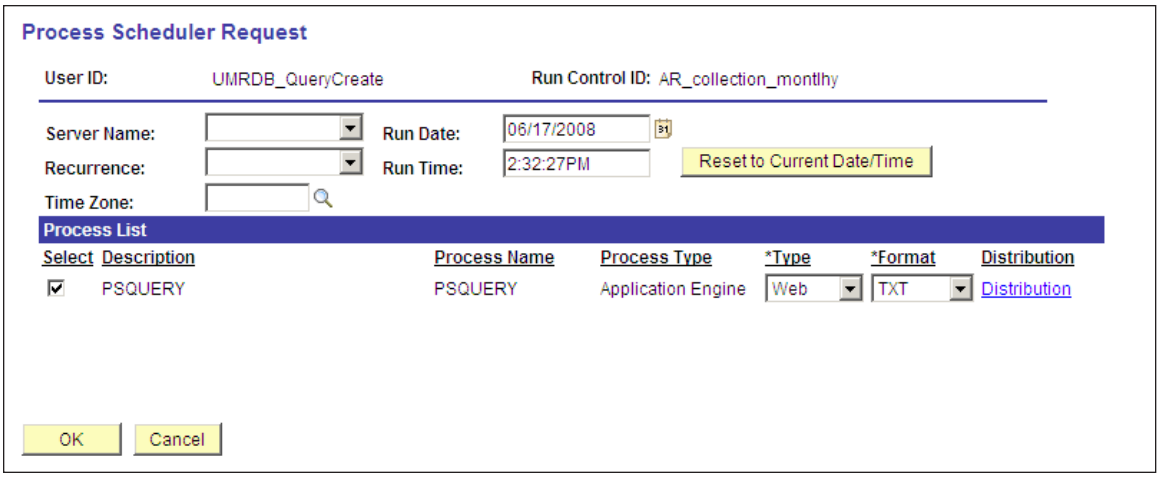
By defining a run control, users can go directly into **Schedule Query** to run a query. (See Schedule Query section of this manual.)

- Click <Add>.
- Enter *Description*. This description will appear in the Report Manager and be helpful to identify the report (except if TXT is selected as the format, in which case the Report Manager description defaults to "PSQUERY").



- Click <OK>

Identifying the Query schedule (cont.)



SELECTING PROCESS REQUESTS

The **Process Scheduler Request** page enables you to set the server, run date and time, how often the process runs (the recurrence of the process), output type, and format.

To select a process request:

1. Open the Process Scheduler Request page. (Select **Reporting Tools > Query> Schedule Query**. Select a run control ID and click <Run>.)
2. Complete the fields on this page.

Server Name	Select the name of the server on which you want the process to run.
Recurrence	Select the recurring time intervals for the process to run. For example, to run a process every weekday at 5:00 p.m., select the predefined recurrence definition *M-F at 5pm*.
Field Name	Field description.
Time Zone	Select the time zone in which the process will run. For example, you might be in Eastern Standard Time (EST) and schedule a process to run in Pacific Standard Time (PST).
Run Date	Select the date that the process will run.
Run Time	Select the time that the process will run.
Reset to Current Date/Time	Click to reset the run date and time to the present date and time.
Select	Select a job or process to run. Multiple jobs and processes can be selected.

Description Identifies a process or job. Jobs are listed as links. Click the link to display the **Job Detail** page, which shows all of the individual processes and jobs that are associated with the selected main job.

Process Name and Process Type Identifies the name and type (such as COBOL or Crystal) of the process as it appears in the process or job definition.

Type Select the output type for this job or process.

An output type that is selected for a process at the process definition level overwrites the output type and the output type drop-down menu becomes unavailable. An output type that is selected for a job at the main job level carries through to the job items. An output type that is selected for individual job items overwrites the output type that you for the parent job. Values are:

File
Writes the output to the file that you indicate in the *Output Destination* field.

Printer
Sends the output to a printer. You can enter a custom printer location in the *Output Destination* field if you have the appropriate security access. If the *Output Destination* field is left blank, the printer that is defined on the **Process Profile Permissions** page is used. If that printer is undefined, the default printer that is defined for the process scheduler is used.

E-mail
Sends the output through an email. To distribute a report to an email list, enter the appropriate information on the **Distribution Detail** page by clicking <Distribution>. By default, the output is sent through email to the person running the process. This option is available for Structured Query Reports (SQR), PS/nVision, and Crystal reports.

Web
Sends all output of the process to the report repository, including log and trace files. The format of the report is specified by the format list.

Window
Sends the output to a new browser window.

Format Select the output format for this job or process.

When an output format is selected for a process at the process definition level, it cannot be changed. Therefore, the output format drop-down menu becomes unavailable.

Select Scheduling Options (cont.)

Note: An output format that is selected for a job at the main job level carries through to the job items. The format that is selected for individual processes or jobs that are attached to a job overrides the format that you for the parent job.

Note: To get text-wrapping support for very long text fields, use HTML format.

PDF format has a maximum page width size of approximately 353 cm and it does not support text-wrapping. All output columns must fit within this limit. A column's size will be as wide as the longest text it has to accommodate. If a text field's length needs more than 353 cm of space, the text may go beyond its column border and successive columns will not print.

Distribution Click <Distribution> to access the **Distribution Detail** page, where you enter additional distribution information when the output type is Web, Window, or E-mail. Also use this page to select a folder name to which the output should be distributed when the output type is Web or Window.

Status The status of the process now appears in the new browser window before the results are displayed. The different statuses are Queued, Initiated, Processing, Success, Error, or Warning. All output for the process is also sent to the report repository, including log and trace files. The format of the report is specified by the format list.

When multiple processes are requested, a new browser window is opened for each request.

Click <OK> to run the query.

The system displays the **Schedule Query** page. The process instance number appears.

Process Monitor

The Process Monitor can be used to view the status of your process requests.

The Process Monitor can be accessed by clicking the Process Monitor link on the **Schedule Query** page or by navigating to: **PeopleTools > Process Scheduler > Process Monitor**.

Process Monitor consists of two pages: the **Process List** page and the **Server List** page. The **Process List** page enables you to monitor the process requests that you have submitted.

Processes listed can be filtered (for example, process type and run status) in order to view only selected process requests. Click <Details> to view details that are associated with particular process requests.

The **Server List** page enables you to monitor the PeopleSoft Process Scheduler server agents within your system.

User ID	View the processes that were submitted by a particular user ID.
Type	View by a particular process type (for example, *Application Engine*).
Last	Specify an interval of time by which to limit the process requests that appear in the list. Enter a numerical value in the edit box preceding the drop-down list box, and then select a unit type from the drop-down menu. Values are Days, Hours, and Minutes.
Refresh	Click to check the current status of a process. This button refreshes the list.
Server	Select to view processes that run on a particular server.
Name	View processes by a process name.
Instance	Specify a range of instances by which to limit the process requests that appear in the list. To limit the view to a single request, enter the required instance ID in the first text field.
Run Status	Select if you want to view processes by a specific status, such as Success or Error.
Distribution Status	Displays the distribution status for each individual job and process. Valid statuses are N/A, None, Generated (OS390), Not Posted, Posting, and Posted.
Save On Refresh	Select to save filter criteria changes when you click the <Refresh> button.
Instance	Displays the process instance, that is, the order in which the process appears in the queue. This number is automatically generated.
Seq (sequence)	This field is blank; it is not used for query processes.
User	The ID of the user who submitted the process.
Details	Click to open the **Process Detail** page.

Submitting Process Requests

A process request enables you to submit a job or process to run. The **Schedule Query** page submits a process request and brings up the **Process Request** page, which enables you to specify such variables as where to run the process and in what format to generate the output based on a run control ID.

To submit a process request:

1. Select **Reporting Tools > Query > Schedule Query**.

2. Search for and select an existing run control ID, or select the **Add New Value** tab to enter a new ID.

3. Select the query you want to schedule and update any prompt parameters.

   Click <Update Parameters> to select or change the value that is required for each available prompt. When values have been selected, they appear in *Prompt Name* and *Value*.

4. Click <Save> to save changes and remain on the **Schedule Query** page.

5. Click <Run> to submit the query process request and display the **Process Scheduler Request** page.

   When you are scheduling queries from Query Manager or Query Viewer, the <Run> button is replaced with an <OK> button.

6. Click <Process Monitor> to view the status of your request; click <Report Manager> to view the output of your request.

Select **Reporting Tools> Report Manager**. (Click the <Report Manager> link on the Schedule Query page.)

Report Manager is like you own personal inbox of reports and process output. It provides a secure way to view report content, check the posting status of your output, and see content detail messages.

View all of your reports by opening your Report List in your browser.

Select **Reporting Tools > Report Manager**, or click <Report Manager> on the **Schedule Query** page.